

EDUCATION FOR OCCUPATIONAL CHANGE:
A STUDY OF INSTITUTIONAL RETRAINING IN NEW ZEALAND

A thesis
submitted in partial fulfilment
of the requirements for the Degree of

Doctor of Philosophy

at

Lincoln University

by

Alison C. Kuiper

Lincoln University

2002

Abstract of a thesis submitted in partial fulfilment
of the requirements for the Degree of Doctor of Philosophy
Education for occupational change;
a study of institutional retraining in New Zealand

by

Alison C. Kuiper

In the Western world, and specifically in New Zealand, a major impetus for retraining has arisen quite recently and gone largely unnoticed. The new social phenomenon, retraining in the sense of education for occupational change, is examined in this study.

Alongside the three traditionally recognised groups of adult learners: those learning for leisure; second chance learners who have been previously educationally disadvantaged; and upskillers who seek to enhance their existing credentials through further tertiary education; is a fourth; the reskillers, those who are seeking education for occupational change. Women are shown to be pioneers in learning social change in this area of retraining.

The key questions investigated in this thesis concern the existence of this new phenomenon in New Zealand; whether it is national or worldwide; and whether its origins are local or international. Whether there are distinctive characteristics to the manifestation of this phenomenon in New Zealand is investigated by examining current policy and practice. Additional questions concern whether there are features of New Zealand employment or education which make upskilling and reskilling more or less likely in this country; the significance of women being the first to take up education for occupational change and what can be learnt from comparison with other countries specifically the Netherlands and England.

Education takes place within a set of intersecting socio-political contexts. In the modern world these are simultaneously international, national, local and institutional. They impact on participants in a course of study yet are not often manifest to the individual. Learning for life' is a significant area of both international and national socio-political concern,

manifesting itself in a significant set of public discourses and in social phenomena which, as in this case of education for occupational change, are little researched or understood.

The historical evolution of public policy relating to adult learners, internationally, and in New Zealand, is documented, with a particular focus on the period from the 1960s onwards. The major theoretical and ideological constructs are outlined and critiqued particularly with reference to public policy in New Zealand. Analysis shows an inexorable shift over time away from knowledge and skills attained through praxis, to knowledge and skills attained through formal institutionalised learning. At the same time as this change was taking place, participation rates in first secondary, and then tertiary, education rose. Concurrently more and more women entered tertiary education in order to make their way into an increasingly credentialised workforce. It is suggested that, credentials are used for screening purposes in addition to providing individuals with knowledge and skills needed for the occupations they enter.

Case studies are used to illustrate and document these changes. Policies relating to learning for life are examined with reference to three different countries: New Zealand, England and the Netherlands. Provision of tertiary education for adults is investigated, and then illustrated through the coverage provided by institutions in three cities, Christchurch, Leicester and Utrecht. These studies show that different countries are subject to international geo-political and ideological forces but respond to them in locally and historically determined ways. The case study/qualitative analysis of the Christchurch Polytechnic's Next Step Centre for Women and the New Outlook for Women courses illustrates the ways in which the twists and turns of public policy in New Zealand over thirty years have affected women wishing to seek education for occupational change. A quantitative study of mature students and their motivations for returning to study at the Christchurch Polytechnic allows for the impact of public policy and institutional provision on a group of mature individuals to be assessed.

The study concludes that education for occupational change appears to be more advanced in New Zealand than in the European countries chosen for comparison. This may result more from individual initiative and the conditions which promote this, than from state policy direction or institutional provision. Policy consequences are proposed on the basis of these findings.

Key words

Education, occupational change, retraining, upskilling, reskilling, New Zealand, mature student, state policy, educational institution, provision, credential, tertiary education, women, university.

Contents

	Page
Abstract	ii
Acknowledgements	vi
Section 1	
Chapter 1 Towards the learning society	1
Chapter 2 Frameworks	21
Chapter 3 Global and local: work and learning	52
Chapter 4 Changing lives, work and skills	78
Section 2	
Chapter 5 Investment in skills and the dream of shared prosperity	102
Chapter 6 Tertiary education in New Zealand	121
Chapter 7 Education policy post-1984; the rhetoric and the reality	144
Section 3	
Chapter 8 The opening door: retraining women	170
Chapter 9 Access and participation	202
Chapter 10 Providing for the future	247
Chapter 11 Learners for life	282
Conclusion	
Chapter 12 The knowledge society	311
References	325

	Page
Appendices	348
Appendix A Qualitative data: the participant observer at work	348
Appendix B Quantitative data: the student survey	354
B1 The student survey of mature students at Christchurch Polytechnic, 1995/6: administration of the questionnaire	354
B 2 Questionnaire	355
B 3 Selecting the sample	360
B 4 Tables of quantitative results: cross tabulations of full and part-time students; cross tabulations by gender.	363
 Figures and tables	
Figure 1	34
Figure 2	36
Table 1	253
Table 2	255

Acknowledgements

While every thesis is a product of a considerable period of work, this thesis, more than most, is the result not only of the time spent in research and writing but also of many years of living with the topic, long before I had identified it as such. I have therefore chosen to acknowledge in this preface those who have provided assistance since I began this study of retraining, upskilling and reskilling. Those with whom I shared the earlier experiences which formed the background to the thesis research are acknowledged in the appendix where I record the experiences which were critical in leading me to see that there was a significant phenomenon, unrecognised but worthy of study. Both lists are likely to be incomplete; I regret any failure to record thanks that may be due.

The Christchurch Polytechnic Foundation provided me with a grant for my research and Lincoln University, a graduate scholarship; I am grateful for the financial support and for the expressions of confidence implied by the granting of these funds.

The Max Planck Institute for Psycholinguistics in Nijmegen was generous in its provision of study space and facilities for a period of 6 weeks in 1999 and I am also grateful to the University of Utrecht and the University of Canterbury for use of their libraries.

At the formal beginnings of the project, Peggy Koopman-Boyden directed me to Lincoln University and Bob Gidlow, a suggestion for which I remain grateful. Roberta Hill acted as an adviser in the early stages and I am grateful for suggestions and support from Dougald McDonald and Rodney Routledge at Canterbury University, and Tracy Berno and Harvey Perkins at Lincoln University, as I sorted out the aims and methods for this research project.

The survey which is reported in Chapter 11, was undertaken early in the research process. In addition to those students at Christchurch Polytechnic who answered the questionnaire I am grateful to a number of people who helped facilitate the process and assisted me in a variety of ways. At Christchurch Polytechnic, Associate Director Ralph Knowles arranged for me to have access to data bases, Graham Muir and Janet Hunt helped select the sample, and Heather Teague provided clerical assistance.

At Lincoln University, the support of Jenny Ross stands out. Her ability to quietly provide moral and practical assistance to her staff was manifest by the way in which she creatively

arranged for me to have a period when I could concentrate on research without also having to teach. This was a crucial breakthrough in enabling me to make progress.

Other colleagues provided help in many ways: during my period of leave, Pip Lynch took over course advising duties which enabled me to concentrate on writing; Clare Simpson shared knowledge gained from thesis writing; Douglas Broughton dealt patiently with requests about resources; Jeannine Edwards, Philippa Masters and Raewyn Saunders, and particularly Evert Kampert, came to the rescue when computer challenges required expertise or innovative responses. In the Lincoln University Library the library staff, particularly Sue Colyer, Shona McCartin, Jane Oakden, Jan Thompson and Lindley Turnbull, cheerfully and efficiently answered queries and provided information or directed me to resources.

Too many people to mention by name have contributed their stories or observations when I raised the topic of retraining or education for occupational change. I am grateful for many interesting conversations both in Christchurch and in other places.

Some people must be thanked for particular help. John Benseman provided comments on the educational changes surveyed in Chapter 8. Alan Wylde alerted me to the role of technological change in New Zealand's economic development and provided me with direct access to material from his website. In Wellington, Dave Maré, then of the Labour Department, and Shona Butterfield, Principal of the Open Polytechnic, were generous in sharing their knowledge and experience. Caitriona Cameron at Lincoln and Robert Tobias, Sally Hunter, Carole Acheson and Carolyn Lidgard at Canterbury provided information on Liberal Studies, New Start and academic skills programmes. Roger Smyth at Lincoln provided statistics which supplemented those more readily available. Elizabeth Eppel from the Ministry of Education, and Rebecca Matthews from AUS, facilitated access to information. Sue Colyer, Susan Foster-Cohen, Nicky Murray, Lindley Turnbull and Susan Wurtzburg helped with proof-reading.

For hospitality I thank Ruth and Len Michaels in London, Susan and Alan Wylde, and Pam and Morgan Williams, in Wellington, and Lesley and Bill Gillespie in Edinburgh.

Many people helped me during the two visits I made to the United Kingdom and the several months spent researching in the Netherlands.

I owe thanks for their help in the United Kingdom to:

Ruth Michaels, Director, Women's Returners Network, who provided information and contacts as well as warm and generous hospitality, and arranged for me to attend the Women's Returners Network Conference in London;

Alan Tuckett, Director and colleagues at NIACE (National Institute for Adult Continuing Education);

Sir William Stubbs for providing me with an entrée to the Department for Employment and Education, Sheffield;

Those at DFEE who provided information: Dom Iannetta, Manager, Val Hewson, Joyce Walmsley, Jayne Middlemass, Jane Haywood;

Joyce Gillespie, Telford College, Edinburgh;

John Carmichael, Project Manager, Lothian and Edinburgh Enterprise Ltd and the office of the European Commission, Edinburgh;

Tony Belmega, Director of Education and Training, Leicestershire Training and Enterprise Council;

Kathy Williams, Academic Registrar, Janet Graham and Penny Williams, Leicester University;

Irene Kirkman, H E Access Director, De Montfort University;

Shai Hall, Charles Keene College of Further Education;

Bryan Harrison Engineering Training Officer, Slack and Parr Leicester.

In the Netherlands:

Professor G. Kanselaar and Dr A.M. Versloot helped me to get my bearings in the very different educational system of the Netherlands.

A number of people at the University of Utrecht supplied information including Drs Coen Pouw, Directeur, Topselect;

Drs Emmy Peters, Senior Adviseur, and Drs E.A. Lankreijer, Raad voor de Volwasseneneducatie, Bunnick;

Dr Willem Houtkoop, Max Goote Kenniscentrum, Amsterdam;

Joke Bergshoeff, Alida de Jong School, Utrecht, and Anki Duin, National Association for the Vocational Training of Women;

Yvonne Thjissen, Foundation Entrelaan, Utrecht;

Sonja de Vries, Adjunct Directeur, and Hannah de Koning, Senior Beleidsmedeweker, Het Utrecht College;

Drs Hans Hardebol, Beleidsmederwerkeronderwijs, Hogeschool van Utrecht;

Drs Josephine Borchert-Ansinger, Director, NIMBAS;

And, at the Arbeidsbureau Utrecht, a well-informed but unidentified official.

I also want to thank my supervisors, Professor Grant Cushman and my senior supervisor, Bob Gidlow. In particular I acknowledge Bob's exceptional skills as a supportive and experienced supervisor. Kon Kuiper was also always willing to listen and to discuss the topic or issues relevant to thesis writing. To Bob and to Kon, my warmest thanks for all their help. I owe a special debt for their careful scrutiny of the text, which led to the addition of many commas and the deletion of many periodic sentences. I take responsibility for those commas still omitted.

Chapter One

Towards the 'Learning Society'

The challenge every country faces is how to become a learning society and to ensure that its citizens are equipped with the knowledge, skills and qualifications they will need in the next century. Economies and societies are increasingly knowledge-based. Education and skills are indispensable to achieving economic success, civic responsibility and social cohesion.

The next century will be defined by flexibility and change; more than ever there will be a demand for mobility. Today, a passport and a ticket allow people to travel anywhere in the world. In the future, the passport to mobility will be education and lifelong learning. This passport to mobility must be offered to everyone.

Köln Charter - Aims and ambitions for lifelong learning (1999)

That the world we live in is not the world our parents knew is incontrovertible. There are many ways in which our lives and the contexts in which we live are different from those of the previous generation. But there are also changes to which we pay less attention and which are less investigated. In what follows we will look at one such area of change, the ways by which people on one career path use educational agencies to prepare themselves for another.

This 'retraining', as I will show, is a largely unrecognised phenomenon and, perhaps on that account, without a specific name. As will be explored later 'retraining' is a term with a variety of meanings. Frequently applied to the acquiring of new skills by the unemployed, particularly through government schemes, it is also used to denote the upskilling and reskilling of those in employment, the sense in which it is used in this study. This study chiefly investigates the phenomenon of 'education for occupational change' and I will use 'retraining' as a shorter synonym for this in the absence of a more specific term. 'Upskilling and 'reskilling' will also be used as and where appropriate. 'Upskilling' will be used to

denote education undertaken for the purpose of occupational change on a broadly similar career path while reskilling will be used to denote education undertaken for the purpose of occupational change to take up a different career path. Thus an accountant who takes a course leading to a qualification as a company secretary is going to continue within a broadly similar career path in business and management through upskilling, while a qualified fitter and turner who takes a course leading to a qualification in journalism is preparing for a more radical change from his/her previous career path.

The major hypothesis of the study is that, in the Western world, and specifically in New Zealand, a major new impetus for retraining has arisen largely unnoticed and certainly under-researched. The suggestion that retraining is taking place to a greater extent and in new ways raises questions about the impetus for the change; the forms it takes and how widespread it is; and whether it is, in fact, taking place especially in New Zealand. Related questions concern the roles played by individuals, by educational institutions, employers and by the state; whether, if this surge in retraining is a local phenomenon, it differs from what is happening in other countries; and whether there are implications for future policy and provision.

Research questions

This study investigates the major new impetus for retraining, that of education for occupational change.

The key questions for this investigation are thus:

- *Is retraining, in the sense of education for occupational change (upskilling and, more particularly, reskilling) a new social phenomenon in New Zealand?*
- *If so, is it a national or a worldwide phenomenon? Are its origins local or international?*
- *Are there distinctive characteristics to the manifestation of this phenomenon in New Zealand?*

Two related questions:

- i *What are the ostensible aims of policy relating to retraining? And*
- ii *What are the actual practices?*

are posed in relation to current policy and practice of retraining in New Zealand.

- *Are there features of New Zealand employment or education which make upskilling and reskilling more or less likely here?*

The relevance of two further questions will become apparent as the study progresses:

- *What is the significance of women being the first to take up retraining as defined here?*
- *What can we learn from a comparison with other countries, specifically the Netherlands and England (or where more appropriate, the United Kingdom)?¹*

Each of the questions above will be addressed in detail in this study. All the following questions depend on the first: *Is retraining, in the sense of education for occupational change (upskilling and, more particularly, reskilling) a new social phenomenon in New Zealand?*

Worldwide there appears to be little exploration of the phenomenon of education for occupational change via upskilling and reskilling despite its being mentioned frequently as a feature of future labour markets. This study fills a gap in current knowledge by showing that retraining, in the sense of education for occupational change, is in fact a current reality. Specifically, New Zealanders are retraining in considerable numbers, but, as Chapter 9 makes clear, the participation has been occluded by the way in which the relevant statistics have been presented. The actual, as distinct from the espoused, policy and practice undertaken by governments and institutions is under-researched as are the individuals who are seeking retraining, not in order to counter unemployment, but in order to improve their lives and prospects through the occupational change that education can provide.

The second question follows from the first finding. *If so, it is [education for occupational change] a national or a worldwide phenomenon? Are it's origins local or international?* Answering this question requires considering the local and global influences on New Zealand, particularly on the labour market and on education in order to decide the extent to which New Zealand is dependent on international trends or charts its own destiny. New Zealand society is unique. Formerly its distance from the European 'centre' of the global stage was part of its character. Even in the twenty-first century, remnants of its pioneering character still enhance its ability to adapt and adjust.

The related question, *Are there distinctive characteristics to the manifestation of this phenomenon in New Zealand?* is answered partly by an account of the historical development of tertiary education in New Zealand and comparison with provision in the two European countries. The study shows that particular feature of New Zealand education

have influenced and do influence the shape which education for occupational change takes in this country.

In order to answer the questions:

i *What are the ostensible aims of policy relating to retraining? And*

ii *What are the actual practices?*

investigation is undertaken in three areas: government policy and practice; institutions which are providers of retraining; and individuals who have chosen to undertake a course of study in order to retrain.

Are there features of New Zealand employment or education which make upskilling and reskilling more or less likely here? The flexibility and mobility of New Zealand society has been reflected in its labour market. Traditionally it has been easier to enter occupations and move from one area of employment to another than is the case in more traditional societies. Even the growth of credentialism has not inhibited such movement nearly as much in New Zealand as in the societies considered for comparison. The enhanced need for qualifications, combined with occupational mobility, has accentuated the seeking for education for occupational change.

What is the significance of women being the first to take up retraining as defined here? This question is of fundamental significance for the study which had its beginnings in an awareness that women, as adults not school-leavers, were seeking retraining in order to re-enter the labour market. Although women were generally regarded as 'second chance learners' seeking initial training this was not necessarily the case. Some were already trained and/or educated at tertiary level. If the time they spent as mothers was regarded as time spent working all were seeking to move from one career to another. However, because women in the home have been largely invisible in public policy, the retraining they were undertaking was not recognised as significant. The extent to which education for occupational change is a feature of the lives of women, and now also men, has remained largely unrecognised. An account of the rise of retraining for women in New Zealand, supplemented by a longitudinal case study of courses offered at a polytechnic, suggests that changing life patterns are responsible for the increase in the phenomenon. The discussion of the retraining of women thus introduces another significant theme, that of the changing patterns in people's lives of the mix of work, education and leisure. This theme is addressed in concluding chapters.

The final question, *What can we learn from a comparison with other countries, specifically the Netherlands and England / the United Kingdom?* Provides an opportunity to check the findings for New Zealand against those of two European countries, one with similar the other with differing traditions, and so clarify the question of the local or international character of the phenomenon of education for occupational change.

Education for occupational change: outline for the study

Understanding upskilling and reskilling in New Zealand requires an examination of the policy, provision and practice of education for occupational change. We need to understand the ideological and policy framework within which education for occupational change takes place. We need to establish its extent and significance in tertiary institutions and to investigate the reasons for its growth. Only when the phenomenon is recognised and understood can appropriate policy and provision for education for occupational change, and those who undertake it, be made. This investigation aims to provide a comprehensive account of education for occupational change at a tertiary level in New Zealand, with information from each of three areas: those of government, institutions and the individual, illuminating the others. This task will be approached in a number of ways. Because this is a new area of study, the investigation is wide-ranging, covering a variety of disciplines; it is research which is grounded in the investigation of the relevant areas and the experiences of those who have sought retraining.

There are three sections to the resulting investigation.

- *Section 1*, Chapters 1- 4, discusses the global and local forces which affect New Zealand and thus education for occupational change in this country.
- *Section 2*, Chapters 5- 7, is concerned with the impact of the history of New Zealand education, and policy on education for occupational change.
- *Section 3*, Chapters 8- 11, reconnects with the global and ideological discussion and moves to the impact of the global and local, historical and policy forces on women, providers, and individuals.

In addition to summarising the other findings of the study, Chapter 12 concludes that the portfolio lifestyles of those seeking education for occupational change are those of a

pioneering group. The changing patterns of work, education and leisure which are already evident are likely to become more common.

Section 1

Whether this retraining is a local or a global phenomenon, or the extent to which it is one or other of these, are questions which will be addressed throughout what follows. I will lay out what is known about education for occupational change and investigate first the global, and then the local, factors which have contributed to or influenced retraining in New Zealand. These include the geo-political situation of New Zealand and its economic development.

This first chapter introduces education for occupational change in the context of the changing lives of New Zealanders, suggesting that it is a phenomenon that is becoming pervasive and important in global and local terms, while yet being overlooked and under-researched.

Chapter 2 provides a conceptual framework for what follows. I define the concept of retraining and the terms, including *upskilling* and *reskilling*, an essential task for an investigation of this area because many of the definitions of key terms in common use and in the literature are unclear and thus problematical. By defining the key terms and outlining the methodology used in this study, Chapter 2 makes explicit the frameworks that provide the context for the study.

Chapter 3 addresses the changing world of work and the role of the state in New Zealand by considering two important theoretical traditions with implications for retraining in New Zealand: dependency theory and Taylorism-Fordism. The chapter then links the importance of technology for New Zealand's economic development with the role of the state and the demand for skills in the workforce. Examining the concept of lifelong learning reveals the hegemonic nature of much of the discourse about lifelong learning. Originally emancipatory, this term has become increasingly linked in the discourse of governments to economic development. The concept of the social construction of skills which is introduced in this chapter is further developed in the following chapter in the context of women's work.

Chapter 4 considers the nature of the world of work in which individuals who seek to retrain will be seeking employment and identity. Issues related to the changing nature of

employment, workforce participation and the workplace are also discussed. The link between the changing world of work and the increase in the numbers of those seeking education for occupational change is investigated by considering the impact on individuals, and on the family, of the democratisation of paid work. The position and the changing lives of women are central to both the changing face of employment and the social construction of the concept of 'skills'. Their relevance for upskilling and reskilling is explored in this chapter.

Section 2

These three chapters focus more closely on the impact of ideology, policy, history and particular features of tertiary education in New Zealand as they affect retraining.

Chapter 5 examines the assertion that the provision of skills is required for a country to become economically competitive. Key concepts to be investigated include those of 'human capital theory' and 'public and private good'. In this chapter the value of skills and of upskilling is considered in relation to the changing composition of the workplace in New Zealand and the global and technological demands now facing New Zealand. There are two sides to this second investigation: one concerns the presumed benefit to the individual, the other the benefit to society. Concepts of human capital and its rates of return are examined as they relate to the upskilling thesis, namely that the New Zealand economy is in decline and unemployment exists because workers lack skills. The upskilling thesis is critically reviewed.

Chapter 6 sketches the historical development of New Zealand education. Investigating education for occupational change in a modern society requires an analysis of tertiary education. In the case of New Zealand, where most employers employ fewer than ten people, state-funded tertiary education must consequently play a major part in upskilling and reskilling. This chapter addresses the question of whether there are special features of the New Zealand educational system which encourage or discourage the uptake of tertiary education for these purposes. The chapter focuses on the history of tertiary education in New Zealand, particularly that of the universities and polytechnics as the two major providers of retraining, and that of adult education, the informal branch of post-school education.

The significant questions for Chapter 7 concern the role of government, and factors affecting decision-making about the government's responsibility for retraining. Government policy and practice in tertiary education have since 1984 been strongly influenced by dominant local and global political and ideological trends. It is important to trace the influence of these trends on state provision. A review of the New Zealand system of tertiary education at the beginning of the 1980s precedes an investigation into the changes in New Zealand tertiary education policy in the period from 1984 to 1999. The changes affected students, both school-leavers and those seeking retraining.

Section 3

In this section the consequences for the individuals and the providers at the centre of retraining are examined. Women as pioneers in retraining; the changing nature of the participation of mature students; the institutions which provide the opportunities; and individuals who seek further education and training, are covered using case studies and local examples.

Chapter 8 illustrates and supports the hypotheses of the earlier chapters by looking at the reasons why women were early in seeking education for occupational change. It first recaps the position of women in education and employment, including the post-war changes in their lives that led to women seeking to challenge their social position and to embrace retraining opportunities. A case study of the retraining courses for women at Christchurch Polytechnic illustrates the development of such courses. Examining the movement of women from the unpaid to the paid workforce through retraining provides an indicator of government and societal attitudes. The position of retraining is at the intersection of policies of employment, education, and welfare, and women's entry to paid employment has always been sensitive to factors affecting such policies.

The changing nature of tertiary education in New Zealand, outlined in Chapter 7 and illustrated in Chapter 8, has taken place in a global context. Chapter 9 explores the changing nature of tertiary education comparatively. The two themes that dominate the changes in New Zealand are the same globally: first, the changes in participation that have changed the nature of tertiary education, and second, the changes in policies of provision by the state. Both of these are explored further in relation to New Zealand as well as the two countries chosen for comparison. The chapter provides a summary of current tertiary systems in the

England and the Netherlands for comparison with the system in New Zealand. The summary provides a context for the later discussion of the influence of local factors on the provision of retraining opportunities. Changing views of the nature of education and of knowledge are investigated because they underlie discussions and decisions about what kinds of education should be provided, for whom this education should be available and who is taking advantage of it. This chapter again supports the hypothesis that it is not only global forces that are at work in the way retraining has become significant in the last twenty years; local historical and socio-political factors also play a significant role in the way retraining is provided.

Chapter 10 addresses the policy and practice of the providers with reference to the major state institutions which provide tertiary education in New Zealand. The key questions here concern the ways in which returning students are encouraged or discouraged from undertaking education for occupational change. Do universities and polytechnics understand the needs of such students and are they able to provide for them? Does the introduction of a system of Recognition of Prior Learning play an effective role in providing for the recognition of the skills and experience of adult students? In order to appreciate the contingent factors in the relevant education systems, this chapter also uses case studies of the provisions of retraining in three cities to compare and contrast the provision of education for occupational change in universities and polytechnics in England and the Netherlands with that in New Zealand. Utrecht, Leicester and Christchurch are similar in size and each is a university city, but they differ because each is in a different country, within a different social and policy context.

An investigation using a survey and illustrative cases of the motives and attitudes of mature students undertaking further education provides the basis for Chapter 11. Are the students undertaking further study in order to improve their chances in the paid workforce? Do they envisage moving to another area of employment? Who is paying for their study? Education for occupational change in New Zealand, it appears, has distinctive features that are linked to the specific nature of the New Zealand economy, society and its history. These features suggest that retraining in New Zealand would be undertaken by individuals on their own initiative to an extent unknown in the countries chosen for comparison, namely England and the Netherlands. This study considers, in Chapter 11, the evidence for the hypothesis that, in New Zealand, individuals frequently undertake retraining on their own initiative.²

Chapter 12 provides a review, seeking to draw together the factors that make education for occupational change significant in this country. Conclusions are drawn about incidence and features of special significance for upskilling and, particularly reskilling, in New Zealand.

While Chapter 12 concludes the substantive study, Appendix A provides an account of my role as participant in, and observer of, the process of education for occupational change over a period of about thirty years. The period and nature of its genesis explains why this is not a conventional dissertation and justifies a reliance on a methodology which would otherwise have been unavailable.

Changing life patterns

Education for occupational change, I suggest, is one of, and one consequence of, the major changes which have taken place in the lives of recent generations of New Zealanders. As the twenty-first century takes over from the twentieth, the worlds of work and of education are being transformed in countries all around the world but particularly in the developed world to which New Zealand belongs. The life patterns that we as twentieth century New Zealanders once presupposed, are being altered. Until recently our expectations were that a childhood would include, and be followed by, a period of education, and then by work, paid or unpaid, as an adult and finally by a period of retirement.

Over the last century the period spent in education has gradually lengthened as universal primary education has stretched first into the provision of secondary education and then into increasing participation in tertiary education. This is a shift of significant proportions since it has involved substantial changes in the life patterns of many people. In the latter part of the twentieth century, expansion in higher education occurred first in the affluent United States where the population was more mobile both geographically and socially than in Europe. But for the last twenty years this change has been taking place across the developed world and is now also affecting the developing world. It is a change with dramatic consequences.

The current movement towards mass tertiary education is represented by the OECD as the 'third wave' (Shapiro, 1993) within the history of modern Western education. The two previous waves were mass increases in secondary education in the mid-twentieth century and the move towards mass primary education towards the end of the nineteenth century. (Fitzsimons, 1997, p. 117)

Another major change to Western life patterns this century, and a similarly dramatic one, happened post World War II when married women, particularly those of the middle classes, moved from spending most of their adult lives in unpaid work caring for their families, into the paid workforce. They joined men and unmarried women in paid work and began to support themselves economically, causing disruption to the concept of a breadwinner who provided for the family unit. Women could have careers and not just jobs. Employment became democratised with participation open to, and possible for, more men and women over the school leaving age. For some women this was part-time work, for others full-time. Traditionally (and the pattern continued for them), most men had sought full-time work to support themselves and their dependents, often staying in the same area of work, if not with the same employer, for most of their working lives. As we will see, there are connections between these major movements in life patterns and employment patterns.

The most recent changes in the world of work have affected both men and women in the workforce as technology and globalisation have created changes in the types of work now available. Many jobs have become superfluous while other, different, positions have been created. Traditional areas of employment have been affected and traditional skills no longer required (Stubbs, 1995; Yarwood, 1993; OECD, 1996; OECD, 1998). For many in the workforce, this has been seen as, and in fact has involved, a threat, a loss of secure employment. For others it has been an opportunity, a chance to change the way they earn their living and their way of life.

In order to move into a new area of skilled work, retraining is necessary. Just as post-secondary or even tertiary³ education is now essential for much non-routine employment, so further education is required by those wishing to re-enter, or to change occupational focus in, employment.

Surveys of recent graduates in various European countries reveal that completion of higher education has become the typical entry qualification to almost all high-level occupations. In areas such as medicine, law and high-level careers in public administration, graduation has been a formal prerequisite for a long time, but in recent decades managerial and a whole range of newly professionalised careers have generally come to require the possession of a degree. (Brennan, Kogan & Teichler, 1996a, p. 4)

Retraining, in the form of upskilling and reskilling, has thus become a significant feature of the way in which employment and education interrelate as people seek to gain skills for new occupations and careers.

From a European perspective this is a surprising change.

Relationships between higher education and work have traditionally been conceived in two stages: study preceding work. This sequential model became more and more blurred by a growth of the number of people enrolling after a period of professional activity and also by a spread of periods of work placement during the course of study. (Brennan *et al.*, 1996a, p. 18)

As we will see, the new pattern of combining study and work is in fact less unusual in New Zealand but there are new features in this combination that are striking.

The new impetus for retraining

Education for occupational change, the subject of this study, has been a fashionable topic in the discussion of future labour market requirements for more than a decade. That people will have to change jobs several times in their lifetimes has been repeated so often it has become a cliché and a mantra; a cliché in that it is said so often, a mantra in that some who utter it suppose that saying it is by itself enough to create change. In fact this sentiment has been expressed for more than thirty years. Speech notes from an address by an educationalist made in Christchurch in 1968 refer to the changes taking place then:

The world we are living in even now is not the world of our childhood. I am not going to enumerate even the physical changes which have taken place in our life time, let alone the moral and social ones. Even more so will the world of our children be different from the present. The pupils in the schools at the present time will be living and working in the 21st Century. Who will dare to predict the nature of this world? It has been estimated that two thirds of the machines which will be in use in the year 2000 have not been invented, that the majority of the drugs in use in 1980 have not yet been discovered, that three quarters of those at present in use will be obsolete in five years. Half the children in the primary classes at the present time will be employed in jobs which do not at present exist. (Wylde, 1968, p. 3)

Such statements have become more numerous over the intervening years. Stubbs (1995, p. 5) is one of many (IRDAC, 1990; Commission of the European Communities, 1993, in Tuckett, 1995; Creech, 1998) who have asserted that life-long occupations will disappear as rapid changes in technology and the international movements of capital and labour create an international labour market within which new 'cutting edge' skills such as those in the

information and service industries will be at a premium.⁴ Constant and accelerating changes in the labour market will result, and workers will have to adapt (Yarwood, 1993). The calls come at a national level, and from international agencies. The International Year of Lifelong Learning (1970) was sponsored by UNESCO. The World Bank (2000) and the OECD (1995, 1996, 1998) have also sponsored studies and reports which outline the causes and suggest strategies for addressing the situation. One such was the 1996 meeting at ministerial level of the OECD.

The large and continuing shift in employment from manufacturing industry to services, the gathering momentum of globalisation, the wide diffusion of information and communications technologies, and the increasing importance of knowledge and skills in production and services are changing the skills profiles needed for jobs. The distribution of employment opportunities is changing, with many unskilled jobs disappearing. With the more rapid turnover of products and service, and people changing jobs more often than previously, more frequent renewal of knowledge and skills is needed. Along with these developments, confounded by factors such as the ageing of populations, emerging new values and patterns of leisure and work, and changing family relationships, there is the risk of new polarisation emerging between those who participate fully in the acquisition and use of knowledge and skills, and those who are left on the margins. Ministers accepted lifelong learning for all as the guiding principle for policy strategies that will respond directly to the need to improve the capacity of individuals, families, workplaces and communities continuously to adapt and renew. (OECD, 1996, p. 13)

In the United States of America and in the European Union, calls for the retraining of those already in the workforce are reinforced by demographics and the potential shortage of new workers entering the workforce.⁵ In the European Union the call has been for “a genuine right to initial or ongoing training throughout one’s lifetime to be achieved in each Member State through the marriage of public and private efforts” (Commission of the European Communities, 1993, in Tuckett, 1995, p. 1).

The calls for help for workers to cope with change are not new, but the suggestions on how this may be done are. An earlier response focuses on children as learners and preparing them by educating them in fundamentals.

Not only is change taking place but the rate of change itself is accelerating; the curve is getting steeper all the time. How does this concern us in the schools? It means our past aims and methods of instruction are being outmoded. We must educate so that people can adapt and adapt almost continuously not only in their vocations but in their social attitudes. To achieve this our education must have a broad base; we must no longer place the emphasis on the learning of facts and their regurgitation at the right time and place. Quite apart from what I mentioned previously, we can’t keep pace

anyhow. Because of this we must teach for understanding and adaptability. (Wylde, 1968, p. 4)

This suggests the way to solve the situation of increasing change was to educate for adaptability; to provide students with the skills to continue learning by themselves. Now more often the response is to emphasise the need to provide continuing education and retraining in the form of upskilling and reskilling in an institutional setting by formal means for specific employment related ends. This recognition of the change in employment conditions and the suggested response is seen in statements by governments and international organisations, such as that by the Commission of the European Communities:

The nature of work is ... changing rapidly for many in the workforce ... The skills needed to change work, and industry, six or seven times in a working life are different from those needed to pursue a career in a single industry. The new forms of work require judgment, flexibility, and the confidence and ability to continue to learn. As Bertie Ahern, then Minister for Employment in the Irish Republic, said in introducing the OECD Jobs Survey (OECD, 1994), "With the change in labour markets you are an apprentice all your life." (*Financial Times*, 8 June 1994). The skills of such an apprenticeship are as likely to be acquired through general education as in on the job training. As the [Delors] White Paper comments: 'Preparation for tomorrow's world cannot be satisfied by a once-and-for-all acquisition of knowledge and know-how ... Lifelong education is therefore the overall objective to which the national educational communities can make their own contributions.' (Commission of the European Communities, 1993, in Tuckett, 1995, pp. 1-2)

The sentiments expressed here are echoed by the New Zealand Minister of Education in a 1998 statement introducing a white paper on the future of tertiary education. Lifelong learning is the objective for the individual and for the creation of a functioning society in a changing world.

A high performing tertiary sector is a key to a forward-looking, cohesive, creative, and innovative society in the 21st century. Post-compulsory education and training is going to become more and more necessary to secure career pathways and quality of life and to achieve an equitable, cohesive, and culturally dynamic society in which all members can participate. Employers will demand higher and more diverse and knowledge to support the creativity and enterprise upon which their success depends. Over the course of their lives, many people will face the need to retrain, upskill, and change direction - perhaps several times. (Creech, 1998, p. 2)

Where his European colleagues referred to lifelong education without specifying where it would take place, the Minister was, perhaps unwittingly, in his reference to the tertiary education sector, hinting at one of the distinct New Zealand features of education for occupational change which will be further investigated in this study, the tendency for this to

take place in state-funded educational institutions.⁶ Upskilling and reskilling are current global themes but, as we will discover, there are also local manifestations, ways in which retraining differs in one country from another.

Belief in the benefits of lifelong learning

According to the Köln Charter, the 1999 declaration of the 'G8' countries, investment in lifelong education and training will require commitment from, and deliver benefits to, not only governments but also businesses and individuals.

Meeting our social and economic goals will require a renewed commitment to investment in lifelong learning

- by Governments, investing to enhance education and training at all levels;
- by the private sector, training existing and future employees;
- by individuals, developing their own abilities and careers.

The rewards for investing in people have never been greater and the need for it has never been more pressing. It is the key to employment, economic growth and the reduction of social and regional inequality. As we move into the next century, access to knowledge will be one of the most significant determinants of income and the quality of life. Globalization means that developed and developing countries alike stand to gain from higher standards of skills and knowledge across the world. (Köln Charter - Aims and ambitions for lifelong learning, 1999)

Behind statements such as these are many assumptions about the benefits of 'lifelong learning' and 'the knowledge society' for both individuals and society.⁷ The phrase, 'investing in people', here used by the G8 countries, is associated particularly with the United Kingdom government. It suggests that this 'investment' has positive consequences; and Hillman notes of England as others have elsewhere, that:

A 'skills revolution' has been clearly identified as central to the long-term competitiveness of the workforce, and simultaneously as underpinning the government's strategy of combating inequality through work rather than through welfare. (Hillman, 1998, p. 1)

According to Barnett (1994), white papers all around the world reveal that governments want a more educated, or at least a better trained, society. At the same time there is a widening desire for education (Scott, 1995, 1998a; Barnett, 1994). Knowledge is no longer confined to the few, to the specialists, but desired and needed by all to participate in society, and more specifically the workforce. Individuals therefore want knowledge and skills in order to improve their position and participation in society. New Zealand, like the governments of some other countries, now wants individuals to fund this themselves on the

assumption that the acquisition of more skills will benefit the individual and so the individual should pay. According to this view, students should pay for their education apart from the 'subsidy' paid by the state. These 'subsidies' may be paid for equity and efficiency reasons. The 'efficiency argument' is

that the benefits of education can be captured by people other than those paying for the education, and hence subsidies are required to achieve an optimal level of investment in education. In New Zealand, these subsidies are provided by way of fees payments directly to institutions, and through allowances and subsidised loans paid direct to students. (Department of Labour, 1999, p. 46)

So the following assumptions seem relevant and need to be examined:

- 1) Globalisation leads to a growing need for skills.
- 2) Since many of these skills are new or changing, people need to be retrained.
- 3) Retraining in institutional settings requires funding.
- 4) Retraining (like other education) provides monetary benefits for those who study.
- 5) Those who study are those who benefit and therefore they should pay for the retraining.

All these propositions need to be examined if we are to understand how retraining has been theorised in the late twentieth century.

Philosophical and ideological attitudes which underpin the policy and practice of retraining in New Zealand are examined in this thesis as are the three areas in which policy and practice are played out: government policy, institutional provision and individual experience. These three areas differ from those identified in the Köln Charter which identifies the 'investment' as being made by Governments, by the private sector and by individuals. While in Europe these are the crucial players in the area, this is not true for New Zealand. Here the role undertaken by the private sector in retraining is much less significant than in countries where most businesses are large and employ many people.⁸ In New Zealand 97.2 percent of businesses employ fewer than 10 workers and 0.1 percent of employers employ more than 100 workers (Statistics New Zealand, 1998b). There is consequently not the same provision of retraining by employers as in countries that have many large employers (OECD, 2000; Brennan *et al.*, 1996b).

In understanding the form which retraining has taken in New Zealand it is necessary to consider the nature of New Zealand society, particularly the different patterns in the development of education and employment.⁹ The comparison with England and the Netherlands will reveal those facets of retraining which have global impact and also those which are local manifestations and so highlight the specific form of upskilling and reskilling in New Zealand. The reasons for choosing England and the Netherlands for comparative purposes are explored in Chapter 2.¹⁰

The invisibility of retraining

The phenomenon of adults seeking education for employment change occurs at the same time as school-leavers are increasingly prolonging their education by moving into tertiary institutions, regarding this as an essential prerequisite for employment. The result is a notable and acknowledged growth in the numbers of tertiary students and changes round the world in the provision of this level of education by governments, referred to as 'massification'. This period, according to Martin Trow (1973), marks the change from an élite system towards a mass system of higher education. Trow defines élite systems as those which enrol up to 15 percent of the age group: mass systems as those enrolling between 15 and 40 per cent; and universal systems as those which enrol more than 40 per cent. While these definitions appear somewhat arbitrary, they are useful for differentiating between older patterns of tertiary education and more recent post-secondary education participation patterns, and when making international comparisons. They will be used in this study.

The demands from adults for education for occupational change have received much less attention. In New Zealand retraining is seen, as it is worldwide, as an imperative for economic growth and development. Yet, despite its importance for policy makers and politicians, for educators and employers, and for those who seek to be upskilled or reskilled, there is a paucity of detailed information about this phenomenon. Although it has an impact on both the economic well-being of society, and on individuals, major questions about retraining are not only unanswered but often unasked. The 2000 and 2001 reports of the Tertiary Education Advisory Committee, for example, do not address the subject. Lifelong learning is discussed but policy and provision for those undertaking education for occupational change is not explicitly considered. Calls for retraining, and the increases in skills which result from upskilling and reskilling, come from politicians, the business

community and organisations, both national and international, but the level of education for occupational change which is currently taking place through the enrolment of mature students in tertiary education goes unrecognised. The current degree of visibility of these students parallels the invisibility that women were subject to in society and in the workforce for many years.

Conclusion

Lifelong learning is a phrase much used in political speeches but recognition of mature students seeking or involved in tertiary education and training is largely ignored in policy making. Notwithstanding the audibility of the public rhetoric, those retraining and the retraining itself are well-nigh invisible in public discourse. Even in those statistics regarded internationally as authoritative and extensive, such as those published by the OECD, older students have been given little consideration. Despite the rhetoric of lifelong learning, upskilling and reskilling feature as concepts in theory rather more often than in policy and practice. It is the extent of, and the reasons for, this surge in retraining and education, and the policy and practice affecting those seeking them, which are to be investigated in this study.

The next chapter lays out the framework for the investigation of this relatively unrecognised phenomenon.

Notes

¹ In general statistical references are to the United Kingdom while data compiled for case studies is English. A fuller explanation of the choice of English or British data is given in the methodological discussion in Chapter 2.

² In a study undertaken for the Department of Labour, Maire Dwyer surveys all education and training by employees that is consciously supported or acknowledged by employers. The report excludes “education and training that takes place alongside paid work, but where the employer has no interest or investment, in the education and training” (Dwyer, 2000, p. 2).

³ These terms vary in the way in which they are used in different countries. In New Zealand, ‘tertiary’ is increasingly being used to refer to all post-secondary education which takes place in institutions (Maharey, 2000). As distinctions between different kinds of post secondary institutions became increasingly blurred in the 1990s between degree granting and other institutions, universities, colleges of education, polytechnics and wanaga became known collectively as tertiary institutions.

⁴ Roberta Hill and Phillip Capper (personal communication, 1995) suggest that the citation from Stubbs refers to a concept now under serious challenge.

“Both the empirical data and the theory suggest that we have to rethink how we conceptualise and describe ‘jobs’ and ‘occupation’. Most of our conceptual models, reflected in the ways in which labour market and demographic data are collected internationally, lock us in to the idea that an ‘occupation’ is a narrow range of activities built around a static and defined range of skills, and that a ‘job’ is a specific contractual arrangement with a specific employer for the disposition of those occupational skills. The trouble with this is that most data collection based on these concepts leads to a distortion of what people are actually doing in increasing numbers. In response to workplace changes and job redesign, these people are increasingly changing ‘occupation’ without changing ‘job’. There is also increasing evidence that people change their perception of what their occupation is even when what they actually do hasn’t changed much at all, with the result that an occupational change appears in the statistics which isn’t real at all. A good example is the nominal change from ‘supervisor’ to ‘team leader’, when the job functions are the same and the only thing that changes is the title.

Similarly the conventions of data collection force the recording of work patterns which often lead to the recording of ‘job’ change, when in fact no such thing has happened. For example, the location of an IT specialist with a client company over a number of years for the life of a contract, with that specialist being formally on the payroll of the client for that period. Then, after three years they go

back to their home company. Two job changes appear in the statistics, but in fact there has been limited occupational change.”

⁵ According to the Commission of European Communities “ ‘80% of the workforce of the year 2000’ were ‘already in the EU labour force’ in 1993” (Tuckett, 1995, p. 1).

⁶ Brennan *et al.* have pointed out that a study by OECD has indicated a tendency for continuing education in Europe “to be taken outside of conventional higher education institutions” (1996a, p. 18).

⁷ The definitions and usage of these terms are addressed in Chapter 2. There are some conflicting usages, resulting from differences in the ways the terms are used in different parts of the world and over time.

⁸ Differences in the provision of workplace training will be explored in Chapter 9.

⁹ Thorns in *Fragmenting Societies* (1992) argues for an approach to the nature of the contemporary capitalist society based on “the distinct experiences of localities, regions and nation states”. His model recognises the need to study contingent factors when studying global forces; his case studies include education reform in New Zealand.

¹⁰ Pragmatically they were chosen because the opportunity to spend an extended period in one country presented itself and a period in the other could be arranged.

Chapter Two

Frameworks

Education as a public function is assuming a greater importance not only in the lives of boys and girls but of adults as well. Formal schooling and opportunities for learning are ceasing to be once and for all experiences of childhood and youth, part of the apprenticeship to adult life. Husen's phrase 'the learning society' spells out one of the requirements of societies which have a dynamic of technological, social and cultural change.

William Renwick, (1986, p. 53)

The government's electronic commerce strategy released by Information Technology Minister Paul Swain says a lot about capability not just about schooling and education but also about lifelong learning. Business people are looking for school leavers to have skills and talents before employing them. But electronic commerce is challenging the skills of existing employees and will be challenging business' skills and talents. It is worth remembering that eighty percent of the workforce of the next ten years is in employment today. Upskilling our workforce and embracing a training culture is essential.

Prime Minister Helen Clark, (address to the E-commerce Summit, Canterbury Digest, Summer, 2000/2001, p. 28)

An education isn't how much you have committed to memory, or even how much you know. It's being able to distinguish between what you do know and what you don't.

Anatole France (Jacques Anatole Francois Thibault, 1844 - 1924)

Education for occupational change, in the form of upskilling and reskilling, is situated where employment intersects with education and training. It is here that the individual seeks an opportunity to change his or her occupation, way of life and identity. Setting the boundaries for a study such as this is an exercise somewhat akin to drawing a line in the sand, or even, perhaps, in the sea. There are no distinct edges to the content of the study as it is such an under-researched area that these edges are not clearly defined by previous scholarship. Even

the choice of disciplines and methods employed is contestable by one who approaches the topic since, again, there has been so little previous scholarship to provide models for such a study. The topic of retraining can be approached from the perspective of education, economics, history, women's studies, employment and labour market studies, psychology or sociology. Rather than adopting one disciplinary perspective, therefore, the methodology of this study combines a number of approaches. Consequently, and paradoxically, it is necessary to draw boundaries as to the extent of the arguments and areas that can be traversed.

This chapter outlines the frameworks for this study and so is concerned with the definitions of its key terms and methodology. It first addresses the definitions of terms such as retraining, education and training, upskilling and reskilling. The need to investigate policy, provision and practice is discussed and two taxonomies introduced. The chapter concludes with an account of the methodology and discussion of necessity of using multiple methods to investigate education for occupational change.

Towards a definition of 'retraining'

Institutional retraining and public policy relating to retraining, in the sense of education for occupational change, are comparatively modern phenomena. The connection between education and employment which it presupposes essentially began in the post second World War period, prompted first by the changing nature of those seeking to (re-) enter the workforce and second by the changing labour market and characteristics of paid work. The concept of retraining needs to be carefully defined because the term has often been used to refer to initial training for the unemployed, a misleading usage when we are discussing the acquisition of additional education and training by adults who already have skills and qualifications. Many of the government-sponsored programmes in New Zealand in the 1980s were loosely referred to as 'retraining programmes' when they were, in fact, programmes for those who had never been in employment or been 'trained'.

Retraining, therefore, requires elucidation; it is not necessarily a parallel term to 'training', although that is one of the senses in which it is used. Its important place in the employment scene is recent, particularly with the meaning of 'education for occupational change'.

Computerised data bases have many entries for retraining but *The Oxford English Dictionary* (1978, Vol. VIII, p. 578) moves on from an entry for *retrad* to one for *retraict* and then to *retrait* without a mention of retraining.¹ Attempts at a definition further reveal the problem:

the aspiring worker may or may not be in employment; he or she may or may not have previously been trained; they may wish to enter a new field of work or upskill in the same occupation. Even questions as to whether they have previously held paid work may result in varied answers. The term may be used to apply to those seeking a change of career, or a career after a period of paid work, or after unemployment. In the case of some mature students it is difficult to distinguish between retraining, or continuing training, the process of lifelong learning.

There are also differences in the English-speaking world in terms of what is meant by 'retraining'. The British usage is particularly focused on the acquisition of new skills for the work force by those who are unemployed or disadvantaged as is shown by the references to 'lifelong learning' and 'retraining' as used by the government of the United Kingdom. In *'The Learning Age': Agenda for lifelong learning?* Josh Hillman considers the British Labour Government's Green Paper proposals for education, entitled *The Learning Age*, which "offer to establish two new programmes for retraining workers".

The very title of the government's recent Green Paper, *The Learning Age*, is typical of the prominent rhetorical positioning of education at the top of New Labour's agenda. But the government's plans for lifelong learning have taken much longer to emerge than those for compulsory education. This has not been because of any great debate over whether change is needed or over what direction it should take. A 'skills revolution' has been clearly identified as central to the long-term competitiveness of the workforce, and simultaneously as underpinning the government's strategy of combating inequality through work rather than through welfare. (Hillman, 1998, p. 312)

In this statement the association of retraining with workers acquiring new skills and with retraining as a social welfare measure are assumed. As will become clear, in New Zealand retraining differs in its nature, particularly its delivery, from that in the United Kingdom.

While a world-wide study of education for occupational change could cover retraining by industry and private providers as well as that offered by the state at post-school and tertiary level, this study focuses on retraining in New Zealand undertaken in state tertiary institutions.² Not only is retraining through tertiary study the most significant form of retraining in New Zealand but it complements the Government's perception of the need for new skills for the workforce to enable New Zealand to compete internationally.

Investment in the upskilling of New Zealand's adult population will become of greater importance as older age groups increase in size, and as the rate of growth of participation in tertiary education and training by school leavers slows. (Ministerial Consultative Group, 1994, p. 28)

Tertiary education is widely regarded as critical to New Zealand's future success and place in a global society. It is key to securing better career paths, better quality of life and standards of living, and ensuring a more equitable, culturally dynamic and informed society. (Ministry of Education, 1998a)

Education provided by tertiary education providers, businesses, and community groups is vitally important to New Zealand in building a true knowledge society and achieving the economic benefits for such a society. The quality of our knowledge and skills base will determine New Zealand's future success in the global economy and as a cohesive society. (Maharey, 2000, p. xx)

This study, therefore, because its primary concern is with New Zealand, focuses on the following form of retraining: Education or training given and received through tertiary retraining programmes, primarily for use in paid employment, and which is undertaken by persons, whether employed or not, with a view to re-entering employment or improving their employment prospects.

Education and training

Distinguishing between the various usages of 'retraining' is further complicated by the fact that the phrase, 'education and training', is increasingly used, both in official statements and in conversation, as if the terms are inseparable and in preference to referring to 'education' or 'training' alone. This is not surprising as it is often difficult to make a clear distinction between learning which has taken place solely for instrumental and vocational purposes, and that which has the wider role of adding to the cultural capital of the learner, and thus also to the community in which they live. While some training is concerned only with learning how to perform discrete tasks, training and retraining which takes place within what the British term 'higher education' institutions, also involves education. Any such course over an extended period requires the learner to use judgement and develop their cognitive skills. The process of learning itself is an educational process, involving the acquisition of knowledge and the development of analytical skills, albeit at differing levels according to the level of education and training. The term 'tertiary education' as used in New Zealand to cover all post secondary education is less exclusive than the British term 'higher education' as some learning tasks registered on the NZQA framework do not require other than elementary intellectual commitment from the learner. The Ministry of Education statement that, "most tertiary learning is at level beyond that which students achieve at secondary school, that is at level 3 or above on the qualifications framework" acknowledges that some 'tertiary learning' is below that of the upper secondary school. Further, "the boundaries between secondary

and tertiary education are also blurring making this distinction somewhat imprecise” (von Dadelszen, 1998, p. [1]).

Just as the concepts of ‘education’ and ‘training’ are now often used synonymously, we will see that politicians, policy makers and the students themselves do not, and often cannot, make distinctions between ‘further education’ and ‘retraining’ when adults return to study in a tertiary institution.

Tertiary education

In referring to ‘tertiary education’, I use the OECD definition: “ ‘Tertiary’ refers to a stage or level, beyond secondary and including both university and non-university types of institutions and programmes” (OECD, 1998, p. 9). The report from which this definition derives explores comprehensively the OECD choice of the term ‘tertiary’ in preference to

“higher”, which so often connotes university [or] “post secondary” which is regarded as below higher education.

The new approach to tertiary education acknowledges both part time and full-time modes irrespective of the duration of study; it includes students of all ages; it covers a wide spectrum of interests and aptitudes. ... All stages of education, at any point in the life cycle, have the potential and need to contribute to the wellbeing of individuals and society. The distinctiveness of the tertiary stage is that, as it follows primary and secondary education, it is more than ever, the gateway into employment and citizenship for very large numbers of young people. Not only for them however; *for adults of all ages, tertiary education is a point of re-entry to formal structured learning and a means of reorienting careers, and life interests and expectations.* Participation in tertiary education reflects current cultural aspirations of and for youth, the growing interest of adults in systematic learning to advanced levels and the emergence of a knowledge based society in which prolonged education becomes a social norm. (OECD, 1998, pp. 14-15; emphasis added)

My usage of ‘tertiary’ is congruent with this as being the more comprehensive term, and also ensures a consistency of reference when OECD statistics (the most useful available for comparison of the three countries of the study, all of which are OECD members) are quoted. Importantly it is consistent with usage in New Zealand, as is evidenced by the comments that:

The blurring of boundaries between universities and other institutions is simultaneously recognised and *promoted* by the New Zealand government. Policy developers tend to talk of ‘tertiary institutions’ and ‘post-compulsory education’, rather than dealing in a comprehensive way with policy questions pertaining to each domain within the sector (universities, polytechnics, colleges of instruction, wanaga, and private training establishments. (Peters and Roberts, 1999, p. 30, emphasis in the original)

The Terms of Reference for the Tertiary Education Advisory Commission, TEAC, use an even wider definition. “Tertiary education in this context includes business-based education, industry training, and lifelong learning beyond the compulsory school sector” (Maharey, 2000, p. xx).

Upskilling and reskilling

I have also used the terms, *upskilling* and *reskilling*. The distinction is made on the basis of whether or not the training is by those seeking to advance their skills through formal education in the area where they are already trained, or not. If they are already educated and/or trained in a field then the additional activity is *upskilling* and is termed *bijtscholen* in Dutch, roughly ‘additional schooling’. Through this you add additional areas of expertise or skills to those you already have. But for those who wish to enter a new skill area for which they do not have the current skill set, the term *reskilling* is used, in Dutch, *omscholen*, roughly ‘about schooling’, i.e. schooling which will ‘take one about’ in the yachting sense, providing a new path. An alternative translation results in another possible term in English: ‘conversion education’ in the sense that you have changed your direction. I will use the term *retraining* to cover both upskilling and reskilling, but distinguish between the meanings as and when appropriate.

Upskilling is the more commonly recognised concept: employees commonly attend courses in the workplace, seminars in work time or courses to upgrade their skills. It may also be known as Continuing Professional Education, a term associated particularly with employer-initiated upskilling where the employer arranges for professional updating or courses are organised for members by professional associations (Benseman, 1996).

Benseman notes that the justification varies from profession to profession but usually includes: knowledge obsolescence where the ‘half life’ of a profession’s knowledge is constantly decreasing; the need to fill new and alternative roles, e.g. the expanded role of a dentist which now also includes oral hygiene and related areas; the discontinuity between the role a professional may need to play and their training; increased demands for accountability and higher standards for care; legislative deregulation of many professions; new social and political demands, e.g. those made of medical specialists and school principals; and the need for professionals to extend their initial professional education (Benseman, 1996, pp. 234 -5).

Reskilling is less common and is also distinguished by being, more frequently, an activity which is motivated and undertaken individually as it involves learning in a new area. Whereas upskilling is much more likely to be a workplace activity (OECD, 1995)

undertaken with the knowledge and possibly the support of the employer, reskilling, when undertaken formally, is more often linked with changing jobs.³ In such cases it is the result of an individual decision, individual circumstance and likely to be a complex process. A key contention of the study is that in New Zealand both upskilling and reskilling, but especially the latter, are likely to be undertaken on the basis of individual initiative.

*Adult, continuing and community education,*⁴ *nascholen* in Dutch, are not generally regarded as being concerned with skills but rather with general, liberal education. However, as I have suggested and will illustrate, there is more overlap and perhaps less distinction between the skills training and general education for adults in terms of the intentions of the participation of the participants than would usually be assumed. Thus the history, provision and uptake of adult education are of relevance to this study as the survey of students in Chapter 11 demonstrates. The respondents in this survey were chosen because they were mature students undertaking study, either part-time or full-time, in areas which are more often conceived of as vocational, rather than undertaken for personal enjoyment. The findings of this survey suggest in fact an overlap and integration of activities and motivations for undertaking further study.

In much of the writing in the field of continuing education/adult education/community education, the terms ‘learning’ and ‘education’ are not defined or are used synonymously. Arthur, contending that “within adult education few terminologies used offer the conceptual clarity and precision an outsider might seek”, distinguishes between community education, further education, continuing education, andragogy, and the education of adults, concluding that the last is perhaps the best as it is most comprehensive term (Arthur, 1992, pp. 358-9).⁵

Moreland (1999, p. 163) suggests a useful distinction to adopt is that which distinguishes between them according to whether what is acquired is *taught* (education) or *not taught* (learning). Moreland refers to the continuum of learning from formal, through non-formal, to informal in making this distinction (1999, p. 171) and points out that formal education is concerned with certification.

Considerations of equity and benefit

The argument that upskilling and reskilling are narrow and concerned with credentials, in contrast to the mind-expanding nature and social concerns of traditional adult education, has tended to be made by community educators. Their concerns about equity are well founded in that when the disadvantaged miss out on initial education, in fact and by definition, they

miss out also on further education. Many studies have reinforced the finding by Titmus (1989) that “the lower the initial education, the less likely the learner is to continue to learn in adult life”. The concerns of these educators are founded especially on the limited nature of government funding and the fact that the preference for funding vocational courses has impacted on traditional adult and community education.⁶

The validity of these concerns does not mean that criticisms of vocationalism as narrow and failing to contribute to personal development are necessarily true. Just as learning undertaken at the mechanics institutes may have led to vocational gains and personal benefit so too may upskilling and reskilling. This is not to deny “the dominance of a new vocationalism and credentialism” (Tobias, 1996, p. 56) but to note that someone pursuing vocational ends may gain, perhaps unexpected, personal and social benefit from this individually motivated activity. In support of this contention I am adopting the expanded view as expressed by Findsen, who in writing about adult education chooses the term ‘education’ in preference to ‘training’ for several reasons. First, the term education suggests that adult learners are concerned about developing themselves holistically (intellectually, emotionally, cognitively, physically, spiritually) rather than in a specific technical domain. Second, the term training is too narrow and too mechanistic to encompass the diverse array of activities in which adult educators engage. Third, education subsumes training (Findsen, 1996, p. 297).

Education for emancipation

Throughout human history people have depended on skills being passed down by observation and word of mouth from generation to generation. Thus people acquired knowledge and skills from praxis. Essentially much of this learning of the skills on which human living depended was learning for servitude. Skills, whether those of a soldier, a farrier or a farmer, were acquired to use in the service of those with power.

Since the Middle Ages in European societies education has been available to an élite. Education did not directly provide skills for daily living but emancipated those who acquired it for higher service, either the service of God in the case of clerics, or the secular authorities in the case of lawyers, ambassadors and counsellors. It might also have the result of emancipating those who became educated to think for themselves. With the advent of universities in the fourteenth century, education for emancipation became established as a way for providing new knowledge and critical review of many matters.

The distinction between these two objects for learning has played a major role in the evolution of the way learning has been socially constructed during the twentieth century, at times obscuring the elements of skills acquisition involved in education and the educative value of any kind of learning. We will see later that the latter half of the twentieth century has seen skills being reconceptualised as skills obtained in institutional settings for use in paid employment, rather than skills obtained through the trans-generational transmission of praxis. This has further blurred the distinctions between training, in the sense of acquiring skills, and education.

Moreover the senses of the term 'retraining' are wider than those generally applied to 'training' and so, rather than distinguishing between retraining and education, I have chosen to regard these as equivalents in the contexts of this study of retraining in tertiary institutions. The focus in this study on *retraining in tertiary institutions* means that 'retraining' is not used in the narrow sense, but as education for occupational enhancement or change. It is generally very difficult to distinguish whether what someone is doing is 'retraining' or 'becoming better educated'. In the process of undertaking one they will invariably, even if unknowingly, also partake of the other.

This is as true of motivations as it is of the process. A student interested in studying history will find they have developed skills seen as useful for employment as a policy analyst, an engineering student will have learnt to make judgements beyond those concerned with the strength of materials. A former nurse deciding to retrain as a social worker will increase the knowledge he already has of how society works and people react; another mature student may plan a doctorate in Maori language 'purely out of interest' and find it leads to employment; while a third having studied computing 'because I was curious' decides to switch to a career which enables her to use the skills and knowledge she has acquired. In retrospect the path each person followed may be traced but they were often not clear in prospect.

In summary, there are three significant points to note about the relationship between education and training. The first is that these may not be opposing concepts but complementary, co-existing states. The second is that the value of education or of training for the individual lies in the personal and/or vocational use that person makes of it. The third is that not only may the benefits of study be greater than expected but some of the rewards may be unanticipated.

As well as there being for the individual a wider range of benefits from retraining than just vocational ones, there may also be benefits for society, particularly because of the ‘value added’ nature of retraining. If someone who is already well-educated undertakes, for whatever reason, a further period of education or training, the benefits of that ‘investment’ of time and money may well be very high for the individual and for society. The student already skilled at learning may repay the effort of reskilling with outstanding ‘added value’. This argument holds for the way in which much professional education in the United States is delivered at graduate level, e.g. law, medicine, and veterinary science. Having received a general liberal first degree students are well-equipped to pick up more quickly the knowledge which is essential for their vocational qualification. The significant equity issues for a society that has limited resources for those seeking tertiary education thus extend beyond the initial provision of this education.

Further problems of definition

This study takes a comprehensive view of the concept of retraining but problems remain because of a lack of agreement on the key indicators. The previous invisibility of retraining means that there is not a history of discussion and definition of, and differentiation among, the different kinds of retraining. It is in this light that I have suggested the terms, upskilling and reskilling, to cover concepts that people may not use but do recognise when they are explained. Particularly problematic for a consideration of retraining is whether the concept embraces full-time and/or part-time education and training, and whether it covers these when they are undertaken only by someone in paid employment, or only by someone not in the paid workforce or by both types of people. In addition it can be very difficult to distinguish the purpose of participation in a course of study and whether this should be defined as retraining.

These difficulties are echoed in the existence of many definitions of lifelong learning.

Within the past few years, the term lifelong learning has been described in different ways, and examined from various perspectives with a multiplicity of goals in mind. ... [L]ifelong learning may be described inclusively as learning that occurs in or is related to formal educational and training institutions, including work-related-on-the-job training, as well as broader learning within the community and in the home. Lifelong learning takes place throughout the lifespan. (Hatton, 1997, p. v)

While the many uses of the term require investigation (an activity which is undertaken later in the chapter) Hatton’s and OECD definitions suggest that

the new idea underpinning “lifelong learning for all” goes beyond providing a second or third chance for adults and proposes that everyone should be able, motivated and actively encouraged to learn throughout life. This view of learning embraces individual and social development of all kinds and in all settings - formally, in schools, vocational, tertiary and adult education institutions, and non-formally, at home, at work and in the community. The approach is system-wide; it focuses on standards of knowledge and skills needed by all, regardless of age. It emphasizes the need to prepare and motivate all children at an early age for learning over a lifetime and directs effort to ensure that all adults, employed and unemployed, who need to retrain or upgrade their skills, are provided with opportunities to do so. As such, it is geared to serve several objectives: to foster personal development, including the use of time outside work (including in retirement); to strengthen democratic values; to cultivate community life; to maintain social cohesion; and to promote innovation, productivity and economic growth. (OECD, 1996, p. 15)

This seems a very wide and comprehensive definition but the range of adults may be even wider than the definition suggests. While British usage concentrates on the second and third chance seekers, some of those seeking ‘retraining’ in New Zealand would fit the definition of needing to retrain or upgrade their skills only if ‘need’ is interpreted very widely. Some choose to retrain not out of necessity relating to their current job or because of job loss but because they want a change of career.

Of particular concern when sketching the frameworks of this study is the idea of career change which is linked to and implied in ‘reskilling’. An implication is that the person concerned has changed jobs and is now in another occupation. For the purposes of this study being able to define and quantify occupational mobility would be very useful, but this is a difficult task and no appropriate studies of occupational mobility in New Zealand are available.⁷

The matter of the age at which a student can be regarded as a ‘mature student’ or ‘adult returner’ further illustrates the problem associated with providing satisfactory definitions of terms. Defining a ‘mature entrant’ or ‘returning student’ or ‘retrainee’ in terms of age is a task of considerable complexity. In England “mature student” may be used to refer to a student aged twenty-one or older.⁸ According to this usage, a school leaver finishing a first degree might qualify. Twenty-five is the age at which a student is deemed, according to New Zealand government policy, to be independent of their parents for loan and allowance purposes and so presumably adult and mature. In the Netherlands twenty-seven is the age at which subsidised entry to tertiary study ends and full fees become payable. Not only do the ages used in policy differ but the implications may be contradictory. In one case it is an advantage to be a ‘mature student’, in the other a disadvantage. This can even be the

situation with the application of different policies in one country. Study Right policies in New Zealand (until 2000) disadvantaged mature students by requiring them to pay higher fees in some institutions than younger students, but advantaged them as shown above through their eligibility for loans.⁹

In referring to those seeking education for occupational change or already participating in upskilling, the study is concerned not with those who are school leavers but with those already likely to have been in paid employment *and* to have taken part in tertiary education. With the exception of a few of the women in the Chapter 8 case study, they will certainly already have been involved with at least one of these. The case study women who pioneered re-entering the work force by retraining are a special group. Usually they made the change after participating in unpaid work of a significant kind, that of child care. Though they might not have had formal qualifications, in most cases their entry into the paid work force represented for them the start of a second career. They may not have had previous formal training but they will have developed a wide range of skills through experience. A narrow view of 'retraining' might exclude some of them from this study but the change from a career of caring to one in the paid work force qualifies them for inclusion in a study of 'retraining as education for occupational change'.

Policy, provision and practice

Having dealt with definitions we return to the objectives of the study. They were outlined in Chapter 1 as being to answer key questions about upskilling and reskilling in New Zealand. Examining the relationship between current policy and practice of retraining in New Zealand, requires investigating the ostensible policy aims and the actual practice of retraining in New Zealand in three areas: government policy and practice; institutions which are providers of retraining; and individuals who have chosen to undertake a course of study in order to retrain.

The key questions for these three areas are:

- i What are the ostensible aims of policy relating to retraining?
- ii What are the actual practices?

The questions take on slightly different forms in each of the three areas.

In the area of government the task becomes that of ascertaining: what pronouncements have been made about policy; what policy actions which affect retraining have been taken,

particularly in the areas of education and employment; and whether there is congruence or dislocation between policy and practice.

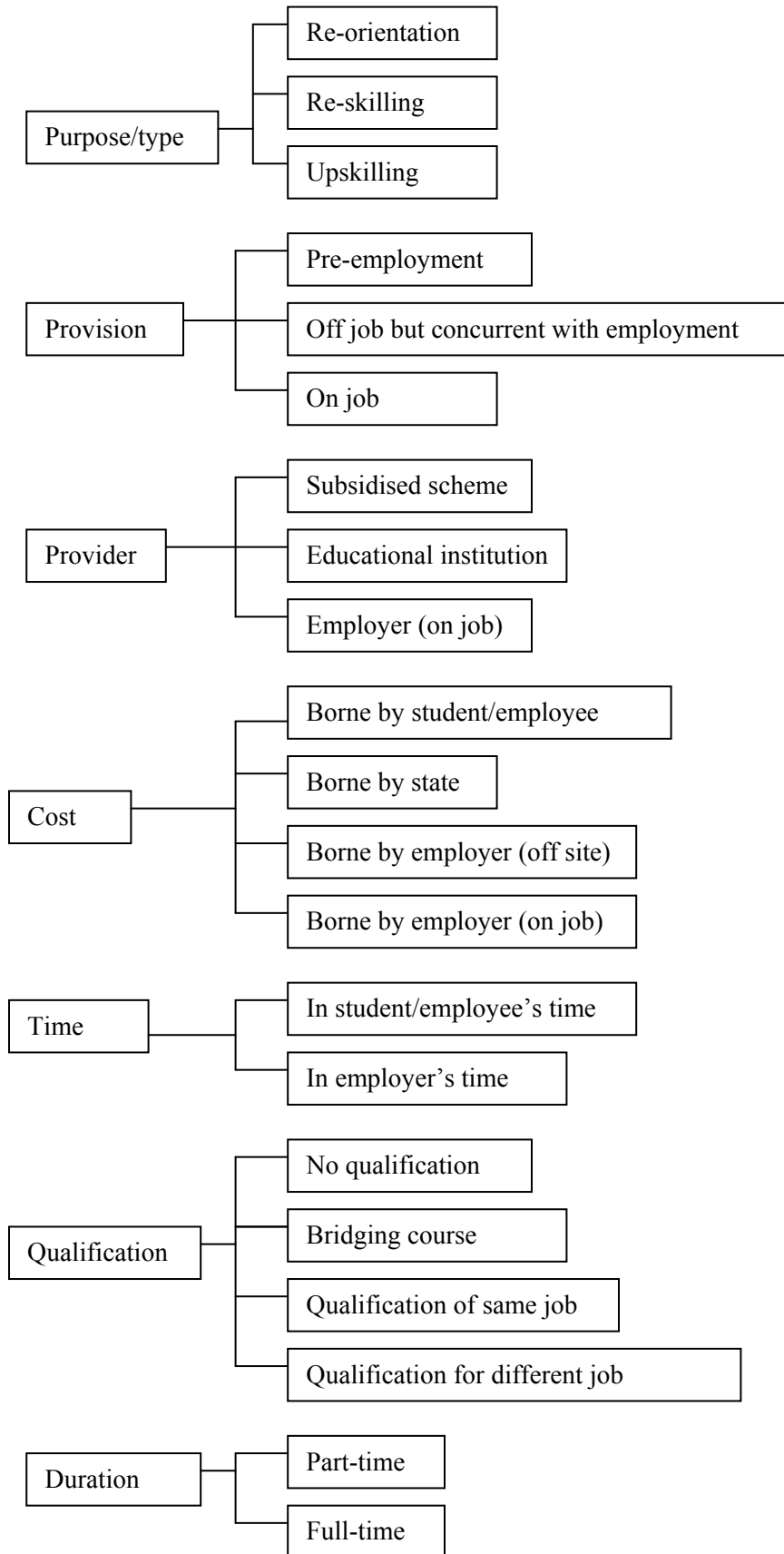
The orientation and role of the state is of crucial importance in assessing the commitment to, and implementation of, retraining in New Zealand. Of particular significance here is the change in political orientation in New Zealand which began with the 1984 Labour Government and was continued by successive governments, at least until the election of the Labour Government in 1999. The perceived need for flexibility in labour markets arose in response to competition from international markets. The move to a more market focused society affected not only employment (e.g. *The Employment Contracts Act, 1991*) but all sectors of the economy and social services, including education and training. Whereas education had previously been regarded as a public good, post-secondary education and training increasingly was regarded as of benefit primarily to the individual and therefore his/her own responsibility to manage and fund. In such an environment, policy relating to retraining may well be seen as the province of the labour markets themselves with state agencies playing little or no role. Whether changes in approach to the provision of tertiary education, signalled by the Labour Government elected in 1999, will affect retraining is yet to be seen.

In the area of providers a further aim of this study will be to evaluate their policies and policy implementation with regard to life-long learning and retraining. It investigates how educational providers see their role, and that of the government, in this area. Are they aware of policy directions and objectives or do they perceive a void with regard to those seeking upskilling and reskilling? In order to understand the place of the provider in the situation, it is necessary to understand the nature of the programmes that might be offered to retrainees.

The key parameters of retraining programmes (as given in Figure 2.1 below) are:

- i. the purpose or type of retraining,
- ii. whether its provision is on or off the job,
- iii. who it is provided by,
- iv. who bears the cost,
- v. who provides the time,
- vi. whether a qualification is the aim, and
- vii. over what period of time and when the retraining takes place.

Figure 2.1 Characteristics of retraining programmes



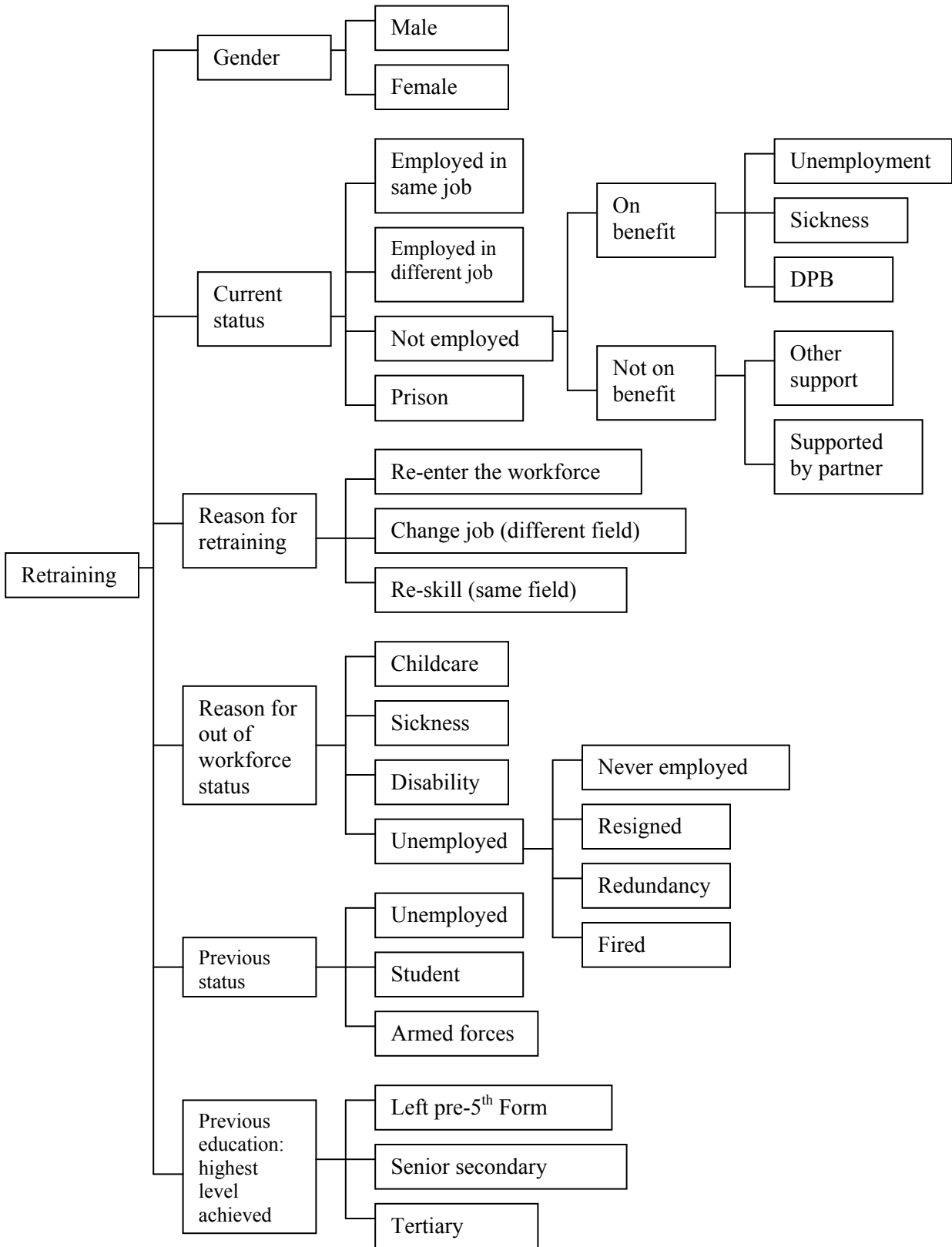
This study focuses on that retraining which takes place in state tertiary educational institutions and provides qualifications. It usually occurs at the student's own initiative and so is more often undertaken in their time and at their expense than at cost to an employer. If it is undertaken part-time, chances are that the education will be concurrent with employment, but if full-time it may be preparatory to a new career. In the case of many of the women in the Chapter 8 case study the purpose of their study was re-orientation but more generally the purpose is upskilling or reskilling. For purely educational programmes the incentive may be unrelated to vocational aspirations.

For individuals who have chosen to retrain the task is to find out whether they are being driven to retrain by pressures in the labour market. Or are they are involved in life style choices where new starts are valued?

For the purposes of the study the characteristics of those retraining (see Figure 2.2) considered significant are:

- i gender of the retrainee,
- ii whether they are currently employed and/or whether they are out of the workforce,
- iii the reason for this,
- iv the reason/s why they are undertaking retraining,
- v their previous status, and
- vi their highest level of education previously achieved.

Figure 2.2 Characteristics of persons undertaking retraining



An individual's decision to retrain is a rich tapestry of interacting factors which we clearly cannot tease apart into a multifactorial causal structure. But there is no doubt that all these factors come into play to a greater or lesser degree in every individual case of a person wanting to retrain. The strength of these factors and of personal factors such as being determined to seek a change or to achieve, may have just as profound an effect on the employment pattern of men and women in the future as the macro economic pressures which people face.

Methodological approach

This is an exploratory study in an under-researched area, rather than being a more definitive account which might be expected from the perspective of a single disciplinary area. Investigating the existence and character of education for occupational change requires a broad variety of information, ranging from the retraining experiences of individuals to documenting statistical trends in employment and education. As the study is interdisciplinary there are, of necessity, limitations as to the extent of the arguments and areas that can be traversed. In adopting an inter-disciplinary approach I am eschewing the safety of a single well-trodden methodology in favour of a range of approaches because no one methodology appeared to provide satisfactory answers to all of the research questions. Uncharted territory is best investigated using multiple methods.

The methodology for the study is based on a wide variety of approaches. Sources for the information presented include both international and New Zealand literature in relevant areas, including unpublished materials. Human capital theory is critiqued since this theory seemed a priori plausible as an explanation of education for occupational change. New Zealand policy documents are presented and analysed. Statistics from international and New Zealand sources are presented to meet the need for hard supporting data in the search for a clearer understanding of education for occupational change. Case studies of individuals and of areas of special significance have been used to enhance and illustrate the findings.

Courses for women seeking to re-enter the paid workforce were an early indication of education for occupational change in New Zealand. Their importance is illustrated through a case study of the Next Step Centre at Christchurch Polytechnic. A quantitative survey of students at the same institution provides support for statistical data and local evidence about mature students seeking upskilling and reskilling. While the main focus of this study is on retraining within the New Zealand context, comparative information about tertiary educational policy and provision in New Zealand, the Netherlands and the United Kingdom

Is used to illustrate different approaches to retraining. A comparative study of the provision of retraining in Christchurch, New Zealand, Leicester, England and Utrecht, the Netherlands provides a basis for noting the similarities and contrasts in these three cities of similar size. Formal and informal interviews with key informants (providers and consumers) supplement the case studies and survey.

Retraining is an area which first came into prominence in the 1970s as women, returning to the workforce after taking time to care for their children, began to attend courses to assist them in transition. Women have continued to be the major consumers in this area but as increasing numbers of men have been affected by the global and local employment trends, more and more males are retraining.

Because of

- i the significance of women as pioneers in this area,
- ii the continuing importance of retraining for women, and
- iii the changing function of retraining which women's experience exemplifies,

wherever possible major illustrations and examples will be chosen which have women as their focus, but the implications for men and the difference between male and female experiences are also considered.

The case study of the Next Step Centre at Christchurch Polytechnic illustrates the changing nature of the demand for, and the provision of, retraining for women. It provides a longitudinal survey of changes in the labour market and their effects on retraining. The methodology of this section is that of qualitative observation and analysis (Goffman, 1959; Lofland & Lofland 1984; Shaffir & Stebbins, 1991). The material in this study, which relates to the experiences of New Zealand women in the period from the 1970s, is based both on written sources and on personal experience as a participant observer (Friedrichs & Lutke, 1975; Fuller & Petch, 1995; Jorgensen, 1989; Shaffir & Stebbins, 1991; Spradley, 1980). This experience fitted the definition of participant observation as combining 'participation in the lives of the people under study with maintenance of a professional distance that allows adequate observation and recording of the data' (Fetterman, 1991, p. 95). The reflection that resulted from this was given depth by my involvement not only in teaching, but also in research locally and nationally into the situation of women, and by participation in decision making at a national policy level.¹⁰

Developing questions

My interest in the sociological phenomenon of retraining began at the end of the 1970s and continued through the 1980s and 1990s as the lives of women in New Zealand underwent considerable change. In the 1990s I also taught applied skills directly for the workforce, to classes of both men and women most of whom already had degrees. I was struck by the significant number of upskillers and reskillers of various ages in all these classes. There were, for example, a forty year old architect retraining for the ski area industry; a former army officer deciding between a career in radio announcing and fitness training; a schoolteacher wishing to work in a laboratory; and a Cambridge Ph.D. graduate seeking employment in environmental research; as well as women studying in order to make the move from nurse, or mother and part-time worker, to a new career. These classes were designed for younger students and the students retraining at first seemed anomalous.

It was at this point that the research question for this study occurred to me in the form: Why were there so many men as well as women in these classes? Why when many of them already had jobs or careers were they seeking further education in a new field? Why were men as well as women seeking to retrain? What were the causes for their undertaking, as individuals, such major, and often costly life changes?

These questions were accompanied by others about the provision of courses and the role of providers and government policy. I became aware that these older students were taken into these courses along with younger students and yet, on the basis of their life experience, might have been better served in some cases by courses tailored more explicitly to their backgrounds and aspirations. The move to upskilling and reskilling appeared to be the result of individual motivation. What if any policy was there in this area? How did the initiatives undertaken by individuals link with any national policy in education or employment?

Further work on the recognition of prior learning (Kuiper, 1994; see Chapter 10) reinforced the suggestion of special provision for upskillers and reskillers. Through my teaching, I became a party to the process on the provider side of the equation and so exposed to the individuals who are making personal sacrifices in order to retrain. I became aware that, apart from the personal knowledge of those involved in retraining, there appeared to be little understanding of the extent and significance of education for occupational change.

The origins of this study are thus grounded in personal experience and observation. On the basis of these, hypotheses were formed about an increase in the uptake of retraining among New Zealand adults in tertiary institutions. Systematic data collection and analysis have

been undertaken to investigate this and subsequent hypotheses. In this way the method used has been similar to that of grounded theory, that described as the general methodology of analysis linked with data collection that uses a systematically applied set of methods to generate an inductive theory about a substantive area (Glaser & Strauss, p. 16).¹¹

Following Max Weber's model, the first step to be taken in the scientific study of social life is to acquire an intimate first hand understanding (Verstehen) of the human acts being observed. It follows that the most efficient approach is to search for this understanding wherever it may be found by any method that appears to bear fruit. The main goal of exploratory research is the generalisation of inductively obtained generalizations about the field. These generalizations are eventually woven into a "grounded theory" of the phenomenon under consideration, the procedure for which is found in a series of publications by Glaser (1978), Glaser & Strauss (1968), and Strauss (1987). (Shaffir & Stebbins, 1991, p. 6)

Part of the approach, that of the case study, has been ethnographic, but it has been supplemented by, for example, the use of literature, statistical information and policy documents, just as

the field researcher typically supplements participant observation with additional methodological techniques in field research, often including semi-structured interviews, life histories, document analysis, and various non-reactive measures (Webb, Campbell, Schwartz, Sechrest & Grove, 1981). (Shaffir & Stebbins, p. 5)

A variety of primary sources relating to retraining courses for women at the Christchurch Polytechnic not publicly available have been used in the case study of the Next Step Centre. These include enrolment data, previous surveys, brochures, publicity materials, course outlines and interviews and newspaper and magazine articles.

A survey, using a postal questionnaire, of Christchurch Polytechnic students over thirty years of age provided quantitative information about those who were studying full-time and part-time while qualitative information about their reasons for undertaking further training comes from personal information supplied by students undertaking retraining.

Given my background in feminist research I am aware that the use of both quantitative as well as qualitative research in this study requires some comment. I contend that this study is informed by a feminist perspective in its emphasis on women as pioneers and its aim of dispersing some of the cloud of invisibility which has surrounded women at home and women in employment. This study is therefore in the tradition of work established by, among others, Ann Oakley (Oakley, 1981). Feminist research is now very varied¹² and issues of power, for example, are tackled in varying ways. There is still cogency, however,

in the emphasis in feminist research on principles of respect for your informants as individuals, not just sources on information. This is more easily handled in qualitative than quantitative research which may appear to reduce the responses of individuals to statistics. The qualitative Next Step Centre case study was based on reciprocal interaction with many women and informed by my checking my intuitions in daily conversations with the other main tutor in the programme.

Quantitative research can be more problematical from a feminist research perspective because informants are asked to provide information and with a large postal questionnaire it is not always possible to provide feedback in return. However, the high response rate (73%) to the questionnaire suggested that the respondents were willing to share information. This sense was reinforced by the surprisingly large number of unsolicited comments, particularly from women. Many wrote a page or more about their experiences, suggesting that the questionnaire provided a welcome opportunity for them to express their thoughts about their involvement in tertiary education and some even expressing gratitude at being asked.

Triangulation

Using multiple techniques provided checks and confirmation in surveying the new area of education for occupational change. As Hofstede notes in his comments on discovering human mental programming:

To achieve good construct validity we ... need both good measurements and good theory ... The ... solution to avoid putting all one's eggs in one basket [is] to use more than one approach to operationalization simultaneously, and to look for convergence between these approaches. Webb et al. (1963: 3) call this process "triangulation", a term used in celestial navigation or land surveying. If we want to determine our distance to a point where we cannot go, we choose two base points where we can go and measure the position of the base point from there. The wider apart our base points, the more accurate our measurement. Thus, in social science where we cannot measure constructs directly, we should use at least two measurement approaches as different as possible (with different error sources) and only go ahead if we find convergence in their results. (Hofstede, 1984, pp. 17-8)

The measurement approaches Hofstede considers are of four kinds. The method when applied to this study uses strategies from three of the four approaches: interviews and questionnaires; content analysis of speeches, discussions, documents; and direct observation. While this study is concerned with a 'social' rather than 'mental' phenomenon, the investigation of policy and practice, providers and participants draws strength from the multifaceted approach as one area of investigation supports another.

Policy and practice are triangulated by investigating them with regard to the policy of government, the provision by institutional providers and the experience of retrainees. Government policy relating to retraining within New Zealand has been documented by investigating relevant ministerial statements by the Ministers of Labour and Employment and Education and other policy pronouncements, legislation and regulations that relate to retraining. Practice has been investigated by considering what initiatives have been implemented by government, and providers. A survey has provided evidence about the motivations and activities of retrainees which is supplemented with illustrations of the experiences of individuals.

The policies and policy implementation of the providers are examined by investigating the provisions for mature students. The two government-funded educational institutions whose policies will be examined are the Christchurch Polytechnic and Lincoln University. Both of these government-funded institutions provide tertiary education. The former operates in general vocational education and training as well as offering some degrees while the latter is a teaching and research institution offering undergraduate, graduate and post-graduate degrees, diplomas and certificates. Christchurch Polytechnic was an early provider of retraining. Analysis of statistical information on male and female students at Christchurch Polytechnic held on the Student Record System, which has been accessed with the agreement of the Polytechnic, aids in establishing trends.

While it has a high number of international students Lincoln University also attracts New Zealand students, and, like the Universities of Leicester and Utrecht, not just local students but those from other parts of the country. In comparison with other universities it has high numbers of post-graduate students, many of whom are mature entrants. Whether there is special provision of courses and support for the target group will be investigated.

Disadvantaged groups

Although Maori education is a feature of any exploration of the New Zealand educational scene, this has not been investigated separately. Maori, like Pacific Islanders, people on lower incomes, and those from disadvantaged groups such as people with disabilities, are under-represented at universities. As Maori have been under-represented in the university student population, including undergraduates, they do not feature significantly in the target group of this study. It is those who are already qualified and seeking upskilling and

reskilling who are most likely to be undertaking education for occupational change at a tertiary institution.

However it is important to acknowledge that “as in other OECD countries, socio-economic background is a major determinant of participation in tertiary education” (Taskforce for Improving Participation in Tertiary Education, 1999, p. 7). Secondary schools in New Zealand are ranked on a 10 point scale with those in the wealthiest areas having the highest decile ranking. In 1997 “only 8% of students entering New Zealand universities were from low decile schools, compared with 52% from high decile schools” and this gap is “increasing not diminishing” (Taskforce for Improving Participation in Tertiary Education, 1999, p. 8).

The current challenge in providing for Maori still includes a need to focus on initial tertiary education for both school leavers and mature students. This statement applies as well to Pacific Islanders who are also under-represented in tertiary education.¹³ Although from 1991 to 1998 the proportion of students of Maori origin in tertiary education increased from 6.8% to 12.6% and Pacific Island student from 2.5% to 3.8% students from these groups are still proportionately under-represented particularly in universities (Ministry of Education, 1998a).

The main barriers to entering education as an adult, particularly for those from these groups have been described as being economic, in terms of fees, associated costs, and income foregone; anxiety about study performance associated with school experiences; and decreasing sufficient support from employers. Despite the rhetoric of lifelong learning and the knowledge society, until Maori and Pacific Island participation in initial tertiary education improves, opportunities to improve their position by upskilling or reskilling at polytechnics and universities remain, by definition, an opportunity not open to many members of these groups (NZVCC, 2000b).

Such a conjunction between ethnicity, poverty and educational disadvantage poses high risks to social cohesion as well as economic development in New Zealand. (Taskforce for Improving Participation in Tertiary Education, 1999, p. 9)

All students are affected by the increasing cost of tertiary education and the burden of student loans weighs heavily on graduates as we will see in Chapter 9. These financial barriers to participation in tertiary education in New Zealand were predicted as affecting particularly those who are already disadvantaged.

Research shows clearly that there are class cultural factors which inform the nature of educational decision-making *in addition to income*; it is highly unlikely that

working-class students will take the *risk* of the burden of a loan, however low the repayment costs appear to be. (Lauder & Hughes, 1990, p. 20; emphasis in the original)

Over the decade the costs of study, and therefore the disincentives to undertaking tertiary education, rose for all students.

Since student fees for tertiary studies were introduced in 1990, they have increased about 250%; and the costs of living have also risen. ... Students without the capacity to draw upon family or other private sources of funding are thus more likely to end up in debt, and with higher debt levels. (Taskforce for Improving Participation in Tertiary Education, 1999, p. 9)

Among those particularly affected and so discouraged from participating in 'the knowledge society' are Maori and Pacific Island students and many mature students seeking education for occupational change.

The New Zealand experience

Retraining has, in New Zealand, distinctive features that appear to be linked to the particular nature of New Zealand's economy and of society and which will be further investigated. New Zealand's economy was, and is, small and vulnerable to global fluctuations in demand for goods; it is a price-taker, rather than a price-setter. As mentioned above most of its businesses are small. Consequently few formal training and retraining programmes are directly offered by businesses. The government plays a major role as an employer as well as legislator and has often been interventionist. And, significantly for retraining at a tertiary level, university education has been open to all in contrast with its restricted availability in other countries.

This interlacing of factors is examined within the New Zealand context. A small-scale comparison is also made in the first two areas (public policy and public provision of retraining and upskilling), with the policy and practices of England and the Netherlands, in order to illuminate the features of New Zealand policy and practice and provide evidence to support the hypotheses about the local character of many of the features of retraining in New Zealand. Investigating other approaches illustrates existence of continuities of experience but also of difference. Global themes appear in this study but there are also local manifestations and significant differences in the New Zealand experience of retraining from that in other countries. These are illuminated by the comparisons.

Other experiences

The United Kingdom (or where appropriate England) and the Netherlands have been chosen for comparison, as they are comparable with New Zealand in being well-developed democracies, with a tradition of valuing education. The three countries have in common stable Western parliamentary systems, and they are nominally ruled by monarchs. Each is an OECD member with a relatively high standard of living and an economy based on a mixture of goods and services. They are all countries with a Germanic speaking tradition and therefore there are commonalities which would not be found with, for example, France (Hofstede, 1984).

The comparison, undertaken to investigate whether education for occupational change occurs in a similar form in the Netherlands and the United Kingdom as in New Zealand, is enhanced through two of the countries being members of the Commonwealth with much shared history, including educational history, while one does not share that tradition. Two are European countries, while one is not. Two are 'old world' nations, one a continental European country, one British, while the third is on the Pacific Rim. These commonalities and differences make for a more illuminating contrast than using a near neighbour, Australia, or the wealthiest, most avid retrainee in the world, the United States.

The two European nations have long histories of continuous industrial development. They also now have in common their membership of the European Community, a commonality of considerable significance. They differ however in their social structures, a difference which is crucial in a consideration of employment and retraining.

In the United Kingdom, more particularly England, the class system in which the nobility and landed gentry held positions of power and influence has continued to be influential even in the modern parliamentary democracy. In response to the query of Michael Heseltine, the Deputy Prime Minister, as to "why Britain's education and training skills lag behind those of [their] major competitors", *The Observer* suggested,

there is no great mystery. Class, which Professor J. K. Galbraith reminded us ... has become an unfashionable word, still casts its shadow over British Education. It is not just that the private education of the affluent has a distorting effect on the quality of education provided by the State. State schools were themselves shaped in response to a class-bound system. (*Observer Review*, 1995, p. 3)

The Netherlands' tradition is one of much greater equality, of towns and burghers rather than of a kingdom and its lords. As in Scotland, in the Netherlands education was a key to privilege and position whereas lineage and inheritance was more significant in England.

This difference between these two European nations sets them apart from each other as well as from the younger society and former colony of New Zealand. Education has played a different social role in each society. In England historically a university education had been the preserve of the upper classes and a sign as much of rank as of learning; in the Netherlands it was a pathway to social prestige and so seen as a good in its own right.¹⁴ The education system has been stratified with distinct levels but with smaller gaps between each level than in England. The actual and perceived wealth of the Netherlands is also an important component of the education and employment scene. Of the two countries, awareness of globalisation and increased economic competition, is possibly stronger in the United Kingdom.

These countries have significant points of similarity and of difference with New Zealand. For example, the Netherlands is a country in which branches of industry play a dominant role in curriculum development (OECD, 1995, p. 26) in contrast with the approach of Anglo-Saxon countries (OECD, 1995, p. 36). New Zealand training policies and qualification systems have been based in the past on those in England and continue to be strongly influenced by both British (both English and Scottish) practices. According to the most recently available data both the United Kingdom and the Netherlands, with New Zealand, are the OECD countries with the highest number of annual hours of training invested per employee, and thus, at the forefront of retraining in practice, if not in policy.

English, rather than British, experiences and practices are used because of the divergence of educational provision in England, Northern Ireland, Scotland and Wales. In the comparison of three countries undertaken in this study, where statistics are given these are for New Zealand, the Netherlands and the United Kingdom because international statistics are collected and presented on this basis. However where the educational systems of the three countries are discussed England, not the United Kingdom, is referred to as, while the educational system in England (and Wales) can be considered a coherent entity, significant differences exist between this and the Scottish educational system.

Statistical reporting

Problems of definition and agreement occur when attempting to find and interpret statistical information, let alone when trying to undertake comparisons across countries. The best source of statistical information about information and training for New Zealand, the Netherlands and the United Kingdom is that compiled by the OECD. The Education at a

Glance statistics include those on tertiary education and what the OECD terms “participation in skill employment training among the employed population”. The problems with the integrity of the former figures and in interpreting them have already been mentioned.

The OECD report explains carefully what “participation in skill employment training among the employed population” covers.

As a skilled labour force is a pre-requisite for success in today’s economy, the education and training of current workers is likely to be the most effective means of maintaining and upgrading the skills of the current labour force. In the face of changing technologies, work methodologies and markets, policy-makers in many countries are encouraging enterprises to invest more in training, as well as promoting more general work-related training by adults.

This indicator presents data on participation and intensity of participation in job-related or career-related continuing education and training (CET) among the full-time, full-year employed population. The data are restricted to employees who are 25 to 64 years old; *working students are excluded*. This indicator focuses on full-time / full-year workers in order to capture more effectively training opportunities for those who have a strong attachment to the labour force. (1996, p. 196; emphasis added)

This information has been gained by asking questions which have taken different forms in different countries. For example that used in the Canadian survey which contributed to the OECD report was: ‘During the past 12 months ... did you receive any training or education including courses, private lessons, correspondence courses, arts, crafts, recreation courses or any other training or education?’

The report notes this is “a very broad definition of education and training, covering a rather wider category of training types than in other surveys” (p. 200); subsequent questions, however, about the purpose of the training make it possible to identify ‘job-related training’. While all care has been taken in gathering the data, it is noteworthy that

measures of incidence offer an incomplete account of the amount or intensity of training, since the duration of training may vary independently of participation rates, both between countries and between population sub-groups. (OECD, 1996, p. 200)

Some of the difficulties in researching the data are no doubt responsible for the variation, and, at times, incongruity, in the results which will be discussed later.

If we are looking for information about those who are retraining while in the workforce, whether New Zealanders or those in the Netherlands or the United Kingdom, the hours they spend, who pays for their training and who initiated it, the OECD statistics will be

informative. But if we want to know also about New Zealanders and those in other countries who are not retraining while employed but who are enrolled in a full-time course of training to reskill, we will need additional information.

Turning to the OECD data on access to and participation in tertiary education provides useful, but not completely satisfactory, information because of the difficulties encountered by the compilers of the statistics in gaining comparable figures. Except where otherwise noted, figures are based on head counts, that is, they do not distinguish between full-time and part-time study. A standardised distinction between full-time and part-time participants is very difficult, as a number of countries do not recognise the concept of part-time study, although in practice at least some of their students would be classified as part-time by other countries (OECD, 1996, p. 133).

There are, therefore, limits to the illumination statistics can provide about the numbers undertaking retraining. Nevertheless, despite the problems inherent in using them, the statistics can indicate some differences between the extent of retraining in different nations. While this study focuses on retraining in New Zealand, comparisons with retraining in other countries, particularly the Netherlands and the United Kingdom, are used to highlight the differences from retraining in New Zealand and the special nature of education for occupational change in New Zealand. For a study of retraining in this country therefore, global and local, current and historical, education and employment contexts are important.

Conclusion

The methodological frameworks for the study outlined in this chapter are concerned with finding terms and research techniques which will enable us to identify and then investigate a phenomenon which has been largely invisible. The parameters of retraining, and the characteristics of those involved in upskilling and education for occupational change, are little known. Multiple methods are used because the study tackles a relatively unrecognised and ill-defined area and using a variety of approaches will enable us to uncover more about retraining than we would from one perspective alone.

Frameworks of a different, contextual, kind are used in the next chapter. Chapter 3 places New Zealand within the framework of the global world of work and within the current and problematic discourses of 'globalisation' and of 'lifelong learning'.

Notes

¹ In the Supplement to *The Oxford English Dictionary*, Vol. III, (Clarendon Press, 1982) ‘re-train’ does appear among the words with re- as a prefix: “Retrain v.t.+ i. train again, spec. to teach (a skilled or trained person) a new skill” (p. 1231).

² Private providers are not included in this study as they do not offer the same range of courses as state providers and they are thus not comparable with the state institutions. Often private providers cater for particular groups such as Maori or provide primarily initial training; others focus on English language teaching for overseas students. Many of them also explicitly cater only for school leavers and the unqualified unemployed. This again makes them unsuitable for a study of education for occupational change. However, as noted in Chapter 7, their presence has impacted on the provision of opportunity by state institutions in that funding has been diverted to them.

³ This is particularly true when it is formally and deliberately undertaken. While Hill and Capper (personal communication, 1995) query the solidity of the terms, ‘job’ and ‘occupation’, reskilling on the job is usually perceived as upskilling. I am referring here to the conscious decision to acquire skills in a new area.

⁴ Terminology and concepts in this sector are as changeable as are the terms ‘lifelong learning’ and ‘the learning society’. Benseman and Findsen focus on definitions in introducing the title of their book *The Fourth Sector*, a phrase which “focuses on that learning beyond structured formalised learning” to combine with primary, secondary and tertiary education “to constitute *lifelong learning*”. Their definitions provide some clarity: “We have adopted the term *adult and community education* for various reasons. First, the ‘and’ between the terms denotes that they are inseparable on many occasions. We use *adult* to distinguish education that is engaged in by persons deemed to be of adult status in societies (each culture defines ‘adult’ rather differently). Second, we use *community* to denote that learning to which we refer is primarily (though not exclusively) driven by and controlled by ‘community’. The notion of community (itself problematic) is used to locate the educative processes and practices in this domain (as opposed to formal and hierarchical structures). The term *continuing education* appears to have lost its support in this country as a frequently used synonym for adult education except in particular situations (e.g. continuing professional education). It is noteworthy that *adult education* provision in secondary schools is commonly known as *community* rather than *continuing education*” (Benseman & Findsen, 1996, p. 2).

⁵ Arthur suggests the following distinctions, which with some modification can be applied also to adult education in New Zealand:

'Community education' as a concept, for example, carries in its more radical form notions of locality, working class action and change. Alternatively it is used generically in the context of traditional adult education within a particular community. 'Further education', however, though often used in government policy papers and legislation in reference to all-post-statutory non-degree education, is usually seen in the institutional context of further education colleges. These deliver general and vocational post-compulsory education, aimed at 16-19 year olds, although, and this needs stressing, increasingly also at older students. The term 'continuing education' reflects most closely the changing nature of adult education. While the influential Russell Report of 1973 referred solely to non-vocational education, the Open University Venables Report of 1976 recognised a harsher economic climate. The term 'continuing education' should embrace 'education made on personal economic, vocational and social grounds' (Venables, 1976:21). The 1982 Report by the then Advisory Council for Adult and Continuing Education also accepted the need for change. "We do not think it is useful to draw artificial boundaries between education and training, between vocational and general education, or formal and informal systems of provision (ACACE, 1982a: 2). It should be noted, however, that the term 'andragogy' has not been widely accepted outside its academic context, while 'recurrent education' emphasises more radical notions of entitlement to lifelong education. Perhaps the more philosophical, all-embracing concept of 'education of adults', by accepting any educational process inside and outside the educational framework, best sums up all the criteria applied (Jarvis, 1983: 31)" (Arthur, 1991, pp. 358-9).

⁶ A useful discussion of the history of adult and community education in New Zealand which incorporates the changing nature and purposes of these is Tobias (1996).

⁷ Dave Maré, Manager, Research and Monitoring, Labour Market Policy Group, New Zealand Department of Labour, (personal communication, November, 2000) suggested the only way to tackle this difficult task was by means of a longitudinal study based on the change in occupational coding in official surveys. He was unaware of any such study in New Zealand and, according to Dwyer (2000, p. 18), "New Zealand has been reluctant to formally engage in workforce prediction or planning over recent years".

⁸ This was the usage I found at the University of Leicester in my conversations with university officials and to which they adhered when I queried it.

⁹ Some institutions elect to set tuition fees which do not reflect the study right and non-study right distinctions.

¹⁰For example, from 1981-1989 I was a member of the National Advisory Council on the Employment of Women which previously advised the Minister of Labour, and now advises the Minister of Employment, on matters relating to the employment of women. This brief included the retraining of

women and the re-entry of women into the labour market. It was in relation to the retraining of women, an area not otherwise of special note for the Council, that I was able to make my clearest contribution. It was a valuable opportunity to observe and be involved in linking policy advice and practice.

¹¹ “Grounded theory is the discovery of theory from data systematically obtained and analysed in social research ... Most writing on sociological method has been concerned with how accurate facts can be obtained and how theory can thereby be rigorously tested. In this book we address ourselves to the equally important enterprise of *how the discovery of theory from data - systematically obtained and analysed in social research - can be furthered*. We believe that the discovery of theory from data - which we call grounded theory - is a major task confronting sociology today, for, as we shall try to show, such a theory fits empirical situations, and is understandable to sociologists and layman alike. Most important, it works - provides us with relevant predictions, explanations, interpretations and applications. ... A major strategy that we shall emphasize for furthering the discovery of grounded theory is a *general method of comparative analysis*”. (Glaser & Strauss, 1968, p. 1; emphasis in the original)

¹² I am mindful of Sue Middleton’s chapter “Towards a sociology of women’s education in Aotearoa”, which provides a useful guide for students of the sociology of education and/or women’s studies (Middleton, 1988).

¹³ At a Jubilee Symposium at the Centre for Continuing Education, University of Canterbury, 3 November 1997, a Pacific Island elder explained this in terms of study as an adult not being part of part of Pacific Island cultural expectation.

¹⁴ Those who were educated, the pastors and professors, were respected for their learning. They were accorded a position for this reason, and were seen as having earned a respect that is still accorded today to those in this society with higher degrees. In the Netherlands the greater equality among citizens translated also into a respect for those who had professional and technical skills at a high, but not a university level. Education and training at ‘Hogeschool’ or polytechnic level is valued as one of the bases for the strong current economic position of the society.

Chapter Three

Global and local: work and learning

Globalization, a complex process involving rapid and increasing flows of ideas, capital, technology, goods and services around the world, has already brought profound change to our societies. It has cast us together as never before. Greater openness and dynamism have contributed to the widespread improvement of living standards and a significant reduction in poverty. Integration has helped to create jobs by stimulating efficiency, opportunity and growth.

The information revolution and greater exposure to each others' cultures and values have strengthened the democratic impulse and the fight for human rights and fundamental freedoms while spurring creativity and innovation. At the same time, however, globalization has been accompanied by a greater risk of dislocation and financial uncertainty for some workers, families and communities across the world.

Köln Charter, (1999, p. xx)

Investigating the growth of education for occupational change in New Zealand requires this to be done in the context of changes in New Zealand society. These changes are influenced by international, usually global, trends and so it is necessary to first discuss the wider background and influences which impact on the New Zealand economy, education and employment. This chapter therefore examines the place New Zealand has within the wider world, its susceptibility to global influences and the extent to which it is affected by international factors or charts its own destiny. To do this we begin by considering two important theoretical traditions with implications for retraining in New Zealand: Taylorism-Fordism and dependency theory. Their relevance lies in helping to assess whether what has happened, and is happening, to the local economy, including labour market trends, is a feature of the New Zealand scene only or a local manifestation of international trends. This leads onto considering local factors, such as the power of the state and the influence of

technological innovation on New Zealand's primary economy. Finally, continuing the investigation of powerful influences, the chapter investigates how the discourse, mainly that of governments, has affected the usage of the term 'lifelong learning', deflecting it from its original emancipatory conception.

Economic development and employment

According to the public rhetoric and, it seems, in actuality, New Zealand is the offspring of 'old world' trading systems and now has no choice but to be a small part of the global economy. The question of the extent to which New Zealand is only part of the larger whole, the extent to which what happens here is unique, as well as the way New Zealand can develop appropriate strategies in a changing international context, require an examination of relevant theories and their application to New Zealand.

David Thorns points out, "Much of the debate [about global social change] over the last decade has been based around models which point to universalising processes and tend to operate at a high level of abstraction." (Thorns 1992, p. x). This is true for debates about trends towards more flexible work, leisure practices, the decay of the welfare state, and the "general notion of movement from a stable, regulated social world to one of greater choice and individualism as older forms of social regulation give way to newer ones" (Thorns 1992, p. x).

The organisation of work

The first industrial revolution in the late eighteenth century resulted in urbanisation and the separation of home and work. The second took place in the workplace as Taylorism and Fordism became established. Taylorism has been described as "that management strategy which aimed to have tight pre-set specifications of tasks embedded in a high division of labour" (Wood, 1989, p. 2), while Fordism linked this "system of mass production work with organisation of mass consumer markets" (Austrin, 1994, p. 239). The publication of Frederick Taylor's *Principles of Scientific Management* in 1911 was followed in 1914 by Henry Ford's introduction of the assembly line and the \$5.00 an hour, eight-hour day in his Chicago factory. While the method Taylor espoused was not new, the significance of the linking of assembly line production, corporatist management style and mass consumption are reflected in the importance attached to the terms Taylorism and Fordism. Their introduction is used to signal a new pattern of organisation in workplace and a new way of

life. “Mass production meant standardisation of a product as well as mass consumption; and that meant a whole new aesthetic and a commodification of culture” (Harvey, 1989, p. 135). The impact of these innovations was therefore felt outside, as well as inside, the workplace.

In the workplace the effects were felt most strongly in manufacturing as tasks were divided into discrete portions which were seen as efficient, and workers were assigned to one of these repetitive tasks. Whereas in earlier times an artisan or craftsman might have been responsible for a whole process, a worker in a Fordist workplace was required to have and use only the skill or skills required for his (sic) section of the work. Braverman (1974, quoted in Austrin, 1994) posited that Taylorism’s concern with efficiency and its consequent deskilling increased output from a cheaper, more manageable workforce.¹ It aided the growth of capitalism because it cheapened the cost of labour, and increased the scale of production and profit, thereby contributing to strong rates of growth in the industrialised world. Inevitably therefore it also affected the trading partners and suppliers of industrialised countries, and so impacted on international patterns of development.

Theories of development

To understand the relationship between the dominant economies of the industrialised nations and their trading partners, New Zealand included, we need to look at theories of development not only in heavily industrialised countries but also at their ‘satellite’ economies. Dependency theory is of particular relevance to New Zealand because of Andre Guther Frank’s suggestion that the dependent countries can only grow as a reflection of the dominant countries.

Peet (1991), in discussing the world of work, contends that Marxism best fulfils the criteria of: linking the development process with the basic features of social existence, being grounded in a more general theory of societal dynamics and holding the prospect of social change, including an explanation of how poor people can improve their lot. Peet concludes that capitalism is not inevitable, but is, according to Marx, the result of societal dissolution and external plunder and trade.

Mercantalism was a highly effective system for changing the orientation of world trading relations from its previous Eastern focus to one centered on Western Europe ... and it is difficult not to concur with the main thesis of underdevelopment theory that the early development of Europe had so devastating an effect on the rest of the world as to provide a basic explanation for their continued poverty today. (Peet, 1991, p. 130)

A central tenet of dependency theory is that colonies are on the periphery of the world's economic system. The concept of core and peripheral nations used in dependency theory is a productive one.

For Wallerstein (1974, 1979) the present world system emerged in the sixteenth century with the discovery of the new world of the Americas and the subsequent development of industrial capitalism. The system was composed of 'core' nations which dominated the system, consisting of the first industrial nations of Britain, Netherlands and France, which were joined in the twentieth century by USA and Japan. The second group was that of the semi-peripheral nations of southern Europe around the Mediterranean, and linked to the 'core' through trading relations and a dependency which limited their internal development, leading to a relatively slow rate of economic and social development. The third was the 'periphery', the outer edge of the system, originally Eastern Europe, which sold cash crops to the 'core'. Finally, beyond these nation states there was the 'external area' of Asia and Africa which became incorporated into the 'periphery' as colonial expansion took place. (Thorns, 1992, p. 1)

However where to place New Zealand, a country with a history of a high level of dependency but also a comparatively² high standard of living, is, as Thorns points out, problematical. Ehrensaft and Armstrong (1978) suggest the category of 'Dominion capitalism, a special case of semi-industrial capitalism', (peripheral economies involving industrialisation through import substitution) to cover Canada, Australia, New Zealand, Uruguay, and Argentina, the dominions and 'honorary dominions' (until World War II).

While in all these countries the twentieth century began with positive expectations, Ehrensaft and Armstrong assert there was less confidence post World War II because

the ultimate fragility of systems whose industry was confined within protected, national boundaries while the economy remained fundamentally dependent on staple exports has been revealed in each of the dominion capitalist societies since the late 1940s. (Ehrensaft & Armstrong, 1978, p. 362)

Without a fundamental reordering of the structure of their national economies, these authors predicted, 'each of the dominion capitalist societies will find the latter third of the twentieth century to be a time of notable gloom' (Ehrensaft & Armstrong, 1978, p. 362). And for Armstrong, 'the colony readily assumed its role in the international division of labour as an imperial farm' (Armstrong, 1978, p. 301).

It attained the status of an apparently fully-developed capitalist society with high standards of living for most of its citizens, a system of social welfare and economic prosperity ... But these appearances mask a history of underlying dependence and lop-sided development. (Armstrong 1978, p. 299)

New Zealand's traditional links with the United Kingdom arise from its earlier status as a colony and a supplier of agricultural produce. With Britain's entry into the European community, New Zealand's dependence has declined but it remains economically dependent on its exports to 'core' nations, and is still culturally linked to these dominant powers, notably the United Kingdom. The profound neo-liberal economic 'reforms' introduced in New Zealand post-1984 bear testimony to the economic problems facing former dominions in the late twentieth century and attempts to escape them.

The organisation of work and the New International Division of Labour

In the latter part of the twentieth century a change in the economic order with greater interaction among all parts of the system took place. One might argue that this constitutes greater interdependence, not just greater interaction. But this is to ignore the power of the multinationals which inherited part of the economic power held by the richest nation states. There are limits to which a country like New Zealand can govern its own economic destiny even after becoming a completely self-governing nation state.

Decolonisation is widely thought of as an act of human compassion and political progress, in the sense that the colonial world asserted itself and became ungovernable from the outside. We have not sufficiently emphasised the fact that, in the 20th century, economic growth, with the support of technology, transferred economic development within the fortunate countries and made them relatively independent of the former colonial world - both for raw materials and as markets.

For example, the great Dutch economist Jan Tinbergen and his team of researchers calculated that it took only two years of domestic growth in the Netherlands to compensate for all the loss of income that came as a result of the independence of Indonesia. Therefore what has been attributed to goodwill and economic necessity should also be attributed to a major economic transformation. (Galbraith, 1996, p. 32)

Thorns points out that "Developments in new technology, in communication and finance systems have increased the portability of capital and therefore led to increased internationalisation of labour" (Thorns, 1992, p. 7). What this actually involves is largely the purchase of labour through the movement of capital rather than the movement of the labour force itself, although this also happens. A classic example is of the former is the movement of ship-building from the United Kingdom and United States to Japan and Korea, and now to the People's Republic of China. The yards move but their former workers do not. Geordies and Glaswegians did not move en masse first to Japan and then to China. An explanation of the mechanism underlying such changes is to be found in the theory of New

International Division of Labour (NIDL) which extended the concept of economic dependency. Developments in new technology, in communication and finance systems increased the portability of capital and therefore led to the increased internationalisation of labour.

The theory... was built on the work of Frank and Wallerstein and shaped by the development of four conditions: first, the development of a large potential labour force consisting of those underemployed within the developed nations and those underemployed and unemployed in the developing nations, second, the development of new technologies and the consequent deskilling, third, the development of an international market for capital, and finally, 'an international superstructure of multilateral and bilateral agreements to ensure co-operation and monitoring of the international financial system'. (Thorns, 1992, p. 7)

The consequent de-industrialisation and re-industrialisation in the developed world can be described as the decline of the smokestack industries and the rise of the sunrise industries as previous skills became outdated and new ones came into demand.³

That capital became more mobile than labour led, according to Thorns, to modification of the work force in five key areas: modifications in the skills and the gender compositions of the workforce; growth in casualisation; a substantial increase in unemployment; and increasing regional disparities within nation states (Thorns, 1992).⁴

There are also consequences for international trading and the local labour markets. Of particular interest in New Zealand, as overseas, is the idea of 'flexibility', both because it signals a distinct change from the Fordist mode of operation and because of its impact on the labour force. The post-World War II period had been a time of strong, relatively stable, economic growth with growth in living standards, global mass markets and the rise of a new international culture. Nation states developed welfare systems funded by this growth and were active in social regulation. An essential aspect of Fordism was a tripartite consensus, sometimes referred to, misleadingly, as a corporate consensus of leaders of government, business and unions.

Post-war Fordism has to be seen, therefore, less as a system of mass production and more as a total way of life. Mass production meant standardisation of product as well as mass consumption; and that meant a whole new aesthetic and commodification of culture. (Harvey, 1989, p. 135)

Writers in the Fordist tradition have argued that the corporate consensus which supported Fordism was bought to an end under Reaganomic and Thatcherite economic policies, and that the 'post-Fordist', post-modern society is characterised by a move from this apparent

stability and uniformity and universalism, to diversity, not least in employment.

'Flexibility' replaced assembly line production as companies moved from 'just-in-case' production for mass markets to 'just-in-time' systems, catering for diverse international and niche markets. Crucial to this is the role of giant transnational corporations so that

it is no longer the imperialist rivalries between the capitalist *states*, but that between the modern transnational *corporations* which determines the economic, the political and indeed the social reality of the world. (Hoogvelt, 1978, p. 84)

Flexibility

Flexibility in employment, as noted above, arose because capital and labour could now move easily across international borders and because the growing competitiveness spurred technological change and innovation. This leads to the creation of new occupations especially in information technology and shortened the half-life of a number of occupations. Firms could relocate where labour was cheaper or labourers could be imported and so the bargaining power of labour was diminished.⁵ Employers could choose to use a variety of types of employment, aided in this by government strategies (such as in New Zealand by *The Employment Contracts Act* of 1991), and the decline in the power of trade unions. 'Flexibility' (Atkinson quoted in Wood (1989) and Austrin (1994)) could be numerical, functional, or distancing.

Numerical flexibility involves the expansion and contraction of the workforce by, for example, employing workers part-time rather than full-time, and the use of casual workers. Functional flexibility concerns the way in which the workers are organised within the firm, by, for example, the breaking down of job boundaries and the promotion of multi-skilling. Distancing, the third form of flexibility, includes not only flexibility in pay levels but also subcontracting, the use of consultants rather than employees, and franchises.

As a result, according to Harvey (1989) and others (Gorz, 1989; Castells, 1986), the labour force can be regarded as being composed of three types of workers: core workers (who perform essential tasks and have some security), peripheral workers (generally part-time employees), and external workers (who may be consultants or casual contract workers). Lifetime patterns of employment have been disrupted. The ensuing changes in employment patterns have had major effects on workers and the patterns of their lives, as will be shown in relation to students and graduates in Chapter 9. Discontinuous employment and portfolio lifestyles result from

the adaptability and flexibility⁶ of workers [having] become vital to capitalist development. Workers, instead of acquiring a skill for life, can now look forward to at least one if not multiple bouts of de-skilling and re-skilling in a lifetime. The accelerated destruction and reconstruction of workers' skills have been ... a central feature in the turn from Fordist to flexible modes of accumulation. (Harvey, 1989, p. 230)

The obsolescence of old skills and the demand for new arises from the transforming power of new technologies as they offer new ways of organising production and increased possibilities in business communication. The Information Technology revolution has arrived as a result of the introduction of new technology in electronic computing and telecommunications. With the pace of change ever accelerating as the cost of computing power falls, the technology is more widely utilised and global restructuring and the new processes reinforce one another. New efficiencies become possible and then, it seems, obligatory. As the world is smaller in that linkages are now fast and efficient, whether for the transportation of ideas, information or capital, nations and firms find that they cannot afford to persist with old ways of production and operation.

As we can readily see, all of these changes have the potential to make small economies like that of New Zealand, and the world of work within them, increasingly vulnerable.

Beyond Fordism?

There is no unanimity on the applicability of theories about post-Fordism, particularly to peripheral countries. Much of the discussion is speculative rather than based on empirical evidence and tends to assertion without allowing for the differences between the manufacturing sector, with reference to which the theory originated, and the other sectors of the labour market such as agriculture. The extent to which it applies to the service sector is particularly debatable.

All too often changes in work organisation are automatically assumed to be a move towards non-Taylorist and innovative forms of management. Any transformation of work is approached in terms of whether it reverses Taylorism or represents an abandonment of Fordism ... New forms of work organisation may co-exist with many of the elements of Taylorism ... The fact that they co-exist with Taylorist practices, of course, further questions whether Taylorism ever dominated the world of production. (Wood, 1989, p. 33)

O'Brien and Wilkes (1993) provide a further assessment of where New Zealand fits within these models of social and economic change. They describe New Zealand as a country in which the agricultural and service sectors now dominate; one in which international capital

is invested; which is part of the global economy; and which is neo-Fordist rather than post-Fordist.⁷

This assessment of New Zealand as neo-Fordist is based on O'Brien and Wilkes' view of New Zealand as having been previously a 'Dependent Agricultural Fordist' state. They describe the transition from Fordist to post-Fordist state as being that from a society with mass production, mass consumption, social democracy, full employment and an ethos of equity, to one with flexible production, niche market consumption, authoritarian politics, a dual labour economy, an ethos of competitive individualism and a shift in class relations and political culture (O'Brien & Wilkes, 1993, pp. 14 -16). It is arguable whether all the characteristics they claim are necessary conditions for a society to be 'Fordist' or 'neo-Fordist', and their equation of Fordism with state intervention can be challenged,⁸ but the essential tenant of their argument is that, in New Zealand, the transition is incomplete. While they accept a shift away from Fordism they contend this has been partial and fragmented. Hence they prefer to speak of neo-Fordism within the New Zealand context.

The significance of local factors: the power of the state

We have seen from the previous discussion that what happens to the world of work in New Zealand is likely to be a function of a number of factors including New Zealand's history as a developed economy among others, New Zealand as a post-colonial country with a history on the periphery, and with a history of its own.

Thorns argues that it is necessary to look at local conditions before adopting a global theory as an overriding explanation.

The analysis of Australia and New Zealand's development as dominion capitalist societies places greatest weight on exogenous factors, the way societies fit into the wider capitalist system and therefore the links to the core nations including Britain. An alternative approach to the development of the two societies is one that stresses endogenous factors such as the nature of the political class struggle, relations between settlers and indigenes, the gendered nature of early settler society, and the form taken by state institutions and structures. (Thorns, 1992, p. 16)

The early development in New Zealand of working class political parties, an active trade union movement, the state regulated labour market and government reformist/welfare programmes led to the implementation of what Thorns, in quoting Boreham, calls 'domestic stabilisation' (Thorns, 1992, p. 16). The changes which the NIDL writers focus on are modified by recognition of regional variation. Thorns points out, for example, that

Australia and New Zealand 'as settler societies have always been dependent upon migration to provide the necessary labour for their economies',⁹ and that the state played an increasingly important role in facilitating the role of New Zealand capitalism. He contends that

the nation state has dropped out of some forms of analysis of contemporary restructuring. The examination of the role of national formations and policies suggests that the nation state is still a significant mediating factor in the examination and explanation of change. (Thorns 1992, p. 136)

Thorns is writing in the context of an assessment of NIDL theory but similar points can be made in relation to other 'global' theories. There are limits to the control exercised by multinationals; the dominant model of de-industrialisation, which was a result of the change from an industrial-manufacturing society, never existed in New Zealand. In this regard the structure of the labour market is of significance historically, particularly the relative importance of manufacturing, agriculture and the service sector. New Zealand agriculture has, since European settlement, made a significant contribution to the country's economy but the proportion of the population employed in agriculture has declined.

Austrin and Curtis (1992) argue the importance of local factors in relation to Fordism. New Zealand, they say is a special case for which even the descriptor 'neo-Fordist' (O'Brien & Wilkes, 1993) is inappropriate. Primary production is more important than manufacturing and the state has played an important regulatory role. In a case study of the meat-processing industry Austrin and Curtis point out that it was the state and farmers, not capital, that controlled the industry. With changes in demand from United Kingdom supermarkets, changes in the labour process were effected by state power. The system changed to one which is still an export earner but is in the process of being subordinated to industrial capital.

From the mid-1980s to the end of the twentieth century, the role of the state in New Zealand altered with the transfer of many of its activities to state owned enterprises and the private sector, and with the change in the way labour relations were structured with the introduction of, for example, the *Employment Contracts Act* in 1991. The 'historic compromise'¹⁰ of capital and labour was ended. Originally greeting de-regulation with enthusiasm and the belief that this path was inevitable for progress, the New Zealand government,¹¹ pursued this path more vigorously than any other OECD country (Easton, 1997). The consequences of this approach for tertiary education will be explored in Chapter 9.

But in areas such as Maori-Pakeha relations, the state, with its actions such as the fisheries settlement, has continued to play a significant role in the economy. More recently, signs of a reversal in direction have been signalled by *The Employment Relations Act* (2000) which alters the balance of power between employer and employee away from the former. The role of the state in New Zealand is a significant factor which needs to be taken into account alongside global forces.

'Added value' from technological innovation¹²

The connection of the role of the state in charting a distinctly New Zealand path links directly with education for occupational change in two ways. The first is the key role of the state in developing the economy through its support of technological innovation. The second is that these technologies have depended, and still depend on, New Zealanders who are educated, skilled and innovative. For continuing economic advance for a country far from most markets, continuing innovation, upskilling and reskilling are required.

Although New Zealand has continued to be an exporter of primary produce, the state has played, and continues to play, an active role in the development of technologies that effect the world of work. It is noteworthy how many of the past technological ventures were started, or have been carried through, with state support. Many of the ventures that have been economically most important to the country have involved a significant degree of modification of an imported technology or the actual development of the technology in New Zealand, rather than the direct adoption of what has been applied elsewhere.

Education and innovation have been required for the development and modification of these technologies; they have also required a workforce which has been adaptable, willing to learn new skills and to retrain in order to capitalise on the added value offered by scientific advances.

The nature of New Zealand's technological development over the succeeding six decades was established by the end of the World War I. By 1918¹³ the skills and inventiveness of New Zealanders had already suggested the following technological innovations: pasture improvement as a means of increasing dairy and meat yields; a successful method for iron and steel manufacture from indigenous iron sands; the favourable economics of large-scale electrification with long-distance transmission (anticipating the Cook Strait cable); the harnessing of geothermal steam for electricity; the electrification of the North Island main trunk line; electrochemical processing based on cheap electricity generated in Fiordland; the

use of alcohol as a fuel; nitrogen fertiliser manufacture from cheap energy; and *pinus radiata* as the best tree for forestry. (Wylde, 2001).

Other significant New Zealand technologies include aerial topdressing and the important series of innovations (including the electric fence, milking shed design, and mechanisation of the cheese making process) which helped make the dairy industry a world leader. Above any other, the growing of grass has been the one technology that has been essential to New Zealand's economic prosperity. The development of grasslands technology provided the basis for major increases in livestock numbers and hence in the principal source of New Zealand's export income. Much of this technology and its development was, and is, state supported. New Zealand's economy received significant impetus from past technological ventures carried through with state support. These technologies have not been imported as a result of the forces of international technology transfer and globalisation. Rather they have been home grown (Wylde, 2001).

Primary industries, with value-added products, are still important contributors to our nation's wealth. Even when, in the 1960s, the price of wool collapsed and New Zealand sought new trading partners and exports, these exports were based on value-added diversification into tourism, horticulture, fishing and forestry, again often with state support.

We need to remind ourselves what is driving our economy. New Zealand will continue to be a bio-economy based on the sustainable utilisation of its natural resources centered on pastoral and arable farming, horticulture, forestry and fishing. It is interesting to note that today the importance of the land-based industries to the economy is greater than it was in the mid-eighties when it was subject to de-regulation and very significant reforms. In the 10 years from 1987 agriculture's contribution to the GDP increased from 14.2% to 15.2%. Today export earnings driven by food and fibre production have almost reached 60%. While we are small producers in terms of world volumes, our contribution, efficiency and technology have made us a leader in world trading for many land-based products. (Wood, 2000, p. 26)

Despite the urbanisation of New Zealand society and the diversification of New Zealand exports, this dependence on technological innovation in the land-based industries remains central to New Zealand's economic survival. The 'knowledge economy' is not new to New Zealand. The particular nature of New Zealand's economy is often overlooked in the debate which implies that the future for New Zealand lies in becoming another Singapore or Hong Kong. Our future, like our past, may be linked to continuing encouragement and state support for education and innovation.

It is clear that a well-educated population must remain a key component for success in this area and the role of state-provided education remains critical. Thus the world of work as it is socially constructed in New Zealand and the New Zealand education system are again seen to be closely interrelated.

Looking ahead in 1964, Sutch noted that

New Zealand is in a state of transition. During the last few years it has been emerging from a colonial type of economy (disguised by high living standards) to one which by the end of the century will be a cross between that of Denmark and Switzerland today. Like Denmark it will specialise in the products of the land and the sea and like both countries it will rely heavily on the skill of its small population to sell exported manufactured goods to the world. New Zealand cannot rely on the economies to be derived from mass production industries for, despite its well spread wealth, the market is too small. As with other rich but small countries it will be the skill incorporated in its specialised, well designed high quality exports that will permit its survival with high living standards.

To achieve these skills New Zealand needs a highly educated critical consuming public and a highly educated critical work-force. Because we are so few we will need to develop to the full the potentialities in every child so that he (and, of course, she) can contribute to the greatest possible extent to building with his varied skills a more balanced, mature and diversified economy. (Sutch, 1964, pp. 1-2)

More recently Paul Callister and Dennis Rose remained confident that

the range of industries in which New Zealand will be internationally competitive during the next twenty years will include a cluster of natural-resource based industries, particularly farming, a range of manufacturing industries, including specialisation in food processing, metal fabrication and engineering, and a range of service activities including business services and tourism. The underlying people skills in all these areas are within our collective ability to shape and modify. (Le Heron & Pawson, 1996, p. 108)

Thus the contribution of those who are skilled and innovative remains critical to New Zealand not perhaps primarily because of global forces but because of New Zealand's internal social and economic history. In the twenty-first century this crucial contribution is increasingly linked with a population which is highly educated. As the increase in the pace of change has intensified, not only school-leavers but those already in the work-force need to be able to contribute to the greatest possible extent. Their ability to make this contribution can be enhanced by upskilling and reskilling as new opportunities and challenges arise.

Globalisation and other ideological discourses

In the twenty-first century New Zealand is still subject to international econo-cultural influences, now identified as in the Köln Charter as, “Globalization, a complex process involving rapid and increasing flows of ideas, capital, technology, goods and services around the world [which] has cast us together as never before” with one consequence being, “Integration has helped to create jobs by stimulating efficiency, opportunity and growth”.

Marcuse offers a salutary reminder about the sweeping way in which the term ‘globalisation’ is used and the dangers of leaving it undefined, as well a caution about global power in this new manifestation. Marcuse points out that:

the language of globalization deserves some explicit attention. To begin with, the word globalization itself is a nonconcept in most uses: a simple catalogue of everything that seems different since, say, 1970, whether advances in information technology, widespread use of air freight, speculation in currencies, increased capital flows across borders, Disneyfication culture, mass marketing, global warming, genetic engineering, multinational corporate power, new international division of labor, international mobility of labor, reduced power of nation-states, postmodernism, or post-Fordism. The issue is more than one of careless use of words: intellectually, such muddy use of the term fogs any effort to separate cause from effect, to analyze what is being done, by whom, to whom, for what, and with what effect. Politically, leaving the term vague and ghostly permits its conversion to something with a life of its own, making it a force, fetishizing it as something that has an existence independent of the will of human beings, inevitable and irresistible. This lack of clarity in usage afflicts other elements of the discussion of globalization as well, with both analytic and political consequences. Let me outline some problem areas, and suggest some important differentiations.

First, the concept of globalization itself: it hardly needs reiteration in these pages that globalization is not something new under the sun, but is a particular form of capitalism, an expansion of capitalist relationships both in breadth (geographically) and in depth (penetrating ever-increasing aspects of human life). But there are two distinct aspects to the development of capitalist relations since 1970 that are often lumped together under the rubric of globalization: developments in technology and developments in the concentration of power. Separating *advances in technology* from *the global concentration of economic power*, and seeing how their combination has changed *class relations*, is critical both for analysis and for political strategy. (Marcuse, 2000, pp. 23-24).

Whether or not one follows Marcuse’s argument further to the point where he finds the key divisions are not among states but among classes, his distinction between developments in technology and developments in the concentration of power is one that helps to clarify the concepts behind the term globalisation.

Awareness of the concentration of power is also key to Gramsci's notion of hegemonic discourse, just as development theory depended on Marx's analysis of power. Gramsci (1957) theorises that dominant social discourses are imposed by ruling élites and set the basic parameters for public discourse. For social change to take place, these discourses need to be subverted by the discourses of non-dominant groups in society. This concept when applied to the pronouncements of governments, particularly those of the 1990s, can illuminate the gap between policy and practice. Where the powerful can dictate not only the terms but also the language of the debate, assumptions are not exposed to light but taken for granted. Terms like 'human capital theory' or 'the labour market', frequently used in the 1980s in debates on education and employment, depersonalise and render invisible the people who do the work or have skills or become unemployed, and assume an inevitability about the measures governments and other powerful influences seek to pursue. This 'market driven approach' has affected retraining as well as initial education and training through the dominance of certain assumptions. These include assumptions about who benefits from, and who is responsible for paying for tertiary education.

As part of the attempt to highlight the hegemonic power of the dominant discourses, Codd (1990b) argues for the power of policy documents in legitimating change in a New Zealand context. He suggests they produce real social effects through the production and maintenance of consent. While they are generally interpreted as expressions of political purpose, that is, as statements of the courses of action that policy-makers and administrators intend to follow, they are not "blueprints for political action, expressing a set of unequivocal intentions" but "ideological texts that have been constructed in particular historical and political contexts" (Codd, 1990b, p. 135).

Codd asserts that the discourse of documents about educational policy

is a form of educational discourse which derives from the mechanistic language of technology and economics. It incorporates such terms as 'input' and 'output', 'cost', 'maximisation', 'productivity' and 'efficiency'...

The most explicit use of technocratic discourse in recent educational policy documents is to be found in the Treasury Brief to the Incoming Government (Treasury, 1987). In this text, education is reduced to a commodity to be exchanged in the market place, such that: "Those who provide the inputs to formal education naturally seek to defend and develop their own interests. Hence, formal education is unavoidably part of the market economy and the Government can afford to be no less concerned with the effectiveness and 'profitability' of its expenditure on education, in relation to the state's aims, than private providers would be in relation to their own" (Treasury, 1987, Vol. 1: 133). (quoted in Codd, 1990b, p. 143)

Codd is asserting therefore that policy documents themselves have a coercive effect in manufacturing consent.

During the period in which education for occupational change has come to the fore and with which this study is mainly concerned, there has been a conflict in New Zealand between the users of this discourse and those espousing the 'liberal-humanist' approach to education, a conflict founded in differing beliefs about the nature and function of society. Very often the assumptions behind the discourse have not been clearly articulated.

The use of "subsidies to empower students" in a presentation by a senior manager in the Ministry of Education is an example (von Dadelszen, 1999, p. [6]). In its use of 'empowerment' the statement echoes a British view: "The existence of a market, in which public and private sector education and training providers compete for custom, empowers individuals by offering them a range of choices" (Employment Department Group, 1994, p. 22). In its use of 'subsidy', it implies that the total cost is the responsibility of the student. Consequently it implies that the state assumes no ultimate responsibility for tertiary education.

The New Zealand Government's commitment to subsidise all participation is unusual in the OECD (p. [2]). ... There was little attention to the use of subsidy design at the OECD meeting. This may be because most countries have very complex funding systems with a range of grants for different purposes often allocated by a number of agencies. No other countries had yet pursued the use of subsidies to empower students the way New Zealand has. (von Dadelszen, 1999, p. [6])

An illustration relating to employment is the use of the terms 'flexibility' and 'flexible labour market' which can have different, even opposed, meanings for those in different parts of the work force. For employees, 'flexible work patterns' originally held out hope of employment being arranged to suit the worker with job-sharing and permanent part-time work and glide time being available to help particularly those with family responsibilities to juggle these alongside their work role. For employers and others in New Zealand after 1991 and the introduction of *The Employment Contracts Act*, 'flexibility' increasingly came to denote arranging workers' hours to suit the employers, with full-time employment being replaced by part-time, shift work and other temporary work, allowing business greater flexibility to change its workforce configuration without significant financial penalty. Assertions that the increase in the use of technology enables work patterns to be more flexible may therefore sound positive but may for some people mean the end to security and lifetime employment.

Lifelong learning

The use of the term, 'lifelong learning' particularly when used by governments, differs from the original conception of lifelong learning as a process wider than vocational training. The term has gradually come to mean something more restricted than it did originally. When the following was written in 1972, attention and growing acknowledgment was being given to the fact

that the adult members of industrialised societies have continually to learn new tricks and put on new thinking caps if they are to ensure their personal adaptation to the changing circumstances of their lives. (Renwick, 1986, [1972], p. 7)

The phrase 'lifelong learning' was used in the sense of secondary socialisation describing

processes of adaptation that in earlier generations would have been dealt with informally [but are now] increasingly being seen to be part of consciously planned programmes which induct individuals into new roles and responsibilities and provide continuing refurbishment and psychological support for them once they are in them. Husen's phrase, the learning society¹⁴ is in this context apt. (Renwick, 1986, p. 7)

New Zealand Director General of Education, W.L. Renwick, regarded a commitment to lifelong education as a policy as being "a commitment to re-think education as a public function and schooling as an organized collection of formal programmes, courses and services". He was sceptical that the degree, diploma and certificate courses offered by New Zealand's educational institutions would serve the needs of adult learners. His vision was at odds with the use of the phrase 'lifelong learning' as used in the 1990s and later, being less focused on the workplace and more on the desires of the individual for intellectual and social expansion. His words are perhaps prophetic:

I am suggesting, then, that in the process of capturing an educational vision of lifelong education and converting it into institutional missions there are very real possibilities of distortion, deflection and conflict. (Renwick, 1986, p. 7)

This change has indeed taken place as he predicted; as will be shown 'lifelong learning' has become largely restricted to vocational reskilling although the term is often used to suggest that the intent is wider. Some of the definitions of lifelong learning acknowledge the dual nature of the concept but much of the usage of the term fails to take account of this duality.

Gramsci's theory and Codd's examples of language takeover and linguistic engineering seem to be borne out since the recent re-definitions of 'flexibility' and 'lifelong learning' in public discourse suit the ends of the powerful, namely the state and employers, while the

earlier senses of these terms were supportive of individuals' needs and wants. The term 'lifelong learning' is ever present in the discourse of the 'knowledge economy' and 'the learning society' (Moreland, 1999, p. 161) but like those terms, ill defined and used with a variety of meanings. Because of its universality and significance for this study and the discrepancy between the way the term has increasingly been used by politicians and adult educators, this section examines the evolution of the term, focusing particularly on its usage in New Zealand, and in the United Kingdom where the conflicting usages are well-documented.

Multiple discourses

Initially the term *lifelong learning* did not have any suggestions of vocationalism. Methven and Hansen trace the origins of the phrase in New Zealand.

In its beginnings, and under other names, it was conceived as an instrument of social change and an augmentor of economic advancement. Initially, in the form of mechanics institutes or mutual improvement societies, and later in the guise of adult, continuing or community education, lifelong learning was originally a working class movement whose purpose was the intellectual, economic and political betterment of those who might otherwise remain an ill-paid, badly-housed, poorly-educated reservoir of cheap labour and occasional cannon-fodder. Lifelong learning's extension in the first half of the century was interwoven with the rise of socialism in its various forms, trade unionism, and the embryonic welfare state. (Methven & Hansen, 1997, p. 5)

This conceptualisation was succeeded in the 1960s and 1970s by debates about fundamental questions concerning the nature and purpose of education, with a background of international upheaval and competition associated with the tensions of the Cold War, decolonisation, the rise of new technologies and increasing internationalisation. *Lifelong education* became one of the themes of the International Year of Education in 1970 at the same time as the Council of Europe adopted *education permanente* as its guiding principle in the field of education and cultural policy. Lengrand's report for UNESCO noted the idea of 'lifelong education' as 'the keystone of the learning society' and pointed out that

Lifelong Learning is a subject which is exercising many minds, sustaining much conversation and debate, and earning a high priority in statesmen's speeches. (Lengrand, 1970, p. 9)

New Zealand adopted this view of the significance of lifelong education, with its aims defined as:

First, the setting into place of structures and methods that will assist a human being throughout his life span to maintain the continuity of his apprenticeship and training.

Second, to equip each individual to become in the highest and truest degree both the object and the instrument of his own development through the many forms of self education. (Lengrand, 1970, p. 45)

In New Zealand the National Commission on UNESCO produced in 1972 a report entitled *Lifelong learning* (Law, 1996, p. 162). Shortly after this the OECD took up in 1973 the same theme with its concept of *recurrent education* (Tobias, 1996, p. 50). The rhetoric was similar in all cases but, according to Law (1996, p. 162) the OECD focus placed priority on economic concerns such as growth.

The European Lifelong Learning Initiative's definition of lifelong learning lauded it as

the development of human potential through a continuously supportive process which stimulates and empowers individuals to acquire all the knowledge, values, skills and understanding they will require throughout their lifetimes and to apply them with confidence, creativity and enjoyment in all roles, circumstance, and environments. (Longworth and Davies, 1996, p. 22)

The British government too presented an all-encompassing vision:

Lifetime learning is not a Government programme, or the property of one institution. It is a shared goal relating to the attitudes and behaviours of many employers, individuals and organisations. (Department for Education and Employment, 1996)

But other commentators have been more sceptical pointing out that in the United Kingdom there has been much concern over the increasing divergence between the originally stated goals of lifelong learning in which it was envisaged as a shared goal and the current view of lifelong learning as vocational. For example, Mannion Brunt pointed out that although the advent and proliferation of the term *lifelong learning* provided an opportunity to bridge the divide between vocational and non-vocational education, in practice the divide increased (Mannion Brunt, 1999, p. 215).

To point to the hegemonic way the term *lifelong learning* has been appropriated for sectional socio-political ends one need only look at its common sense meaning. Lifelong learning is that learning which occurs throughout one's whole life. As suggested in the preface, humans have always been lifelong learners. What is new is equating lifelong learning with formal institutionalised learning for use in the paid workforce, located in educational space and set aside from the world of experience. Whether or not a person does

this latter kind of learning, they will, by virtue of being human and therefore redundantly always be a lifelong learner of the former kind.

So the term *lifelong learning* is used widely, but uncritically and without agreement as to its denotation, demonstrating the need for a realistic assessment of the concept for, as Paul Oliver points out, there is a need to be cautious about educational terms which are used widely and uncritically.

Such concepts are perhaps used in official publications, journal articles and the educational press, and are then replicated in a variety of internal documents in schools, colleges and universities. 'Lifelong learning' is perhaps a concept of this type at the moment ... When a notion such as lifelong learning is at the same time a term of significant approbation and commendation, then there is *a fortiori*, a justification for being cautious ... The provision of lifelong learning is described by some writers as an apparently intrinsic good. (Oliver, 1999, pp. 1-2)

Oliver takes issue with the uncritical nature of statements such as that by Longworth and Davies (1996, p. 8). As if to suggest that the case for lifelong learning is self-evident, they state that lifelong learning does not need to be strenuously argued to those who have a vision of a richer and more fulfilled future for individuals, for society and for humankind as a whole. However proclaiming that lifelong learning encapsulates a notion of wider participation does not by itself result in participation by the under-educated and disadvantaged. As Oliver points out, the use of the term is not sufficient to ensure benefits for everyone because

learning, of course, does not take place within a sociological or psychological vacuum where constraints such as lack of resources or lack of motivation fail to operate. There are, for example, innumerable economic constraints on the educational process. The would-be lifelong learner may have to pay course fees, require access to a computer and printer, need to purchase books, and have the money to travel to a place of study. (Oliver, 1999, p. 2)

So while governments like that of the United Kingdom declare that higher education will play a key role in lifelong learning and want to see it "making an even bigger contribution to the future by increasing and widening participation" (Department for Education and Employment, 1998, p. 3), pronouncements alone will not bring this about. Statements about the social value of lifelong learning conflict with, or may disguise, government intentions. For Merrill, while the intentions may appear liberal the overriding purpose is economic (1999, p. 13). Lifelong learning

is embedded uncritically, within political and academic discourses in Europe ... Political support for lifelong learning by European governments and the European Commission rests on economic arguments: lifelong learning is essential if Europe is to survive economically within a globalised world. (Merrill, 1999, p. 11)

Further investigation of British government statements bears out the claim that the discourse there is contradictory. The British government at times proclaims the social gains but at others the economic benefits.

Creating a culture of lifetime learning is crucial to sustaining and maintaining our international competitiveness ... The skill levels of the workforce are vital to our international competitiveness. Rapid technological and organisational change mean that, however good initial education is, it must be continuously reinforced by further learning throughout working life. This must happen if skills are to remain relevant, individuals employable, and firms able to adapt and compete. (Department for Education and Employment, 1995, pp. 3-4)

And sometimes both:

Learning is essential to a strong economy and an inclusive society. (Department for Education and Employment, 1998, p. 11)

It is not surprising therefore to find scepticism about these multiple discourses and about 'the remarkable consensus'

publicly celebrated by government and opposition spokesmen, leaders of business and of the trade unions, professional organisations, academic specialists and voluntary groups. Lifelong learning has been chosen by them, like some new wonder drug, as the solution to a wide range of economic, social and political problems. (Coffield, 1998, p. 10)

The most extreme of the claims for lifelong learning come in a British government document, the heady language of which provides support for Coffield's wonder drug analogy.

Learning offers excitement and the opportunity for discovery. It stimulates enquiring minds and nourishes our souls ... learning develops the intellectual capital which is now at the centre of a nation's competitive strength ... learning contributes to social cohesion and fosters a sense of belonging, responsibility and identity ... learning is essential to a strong economy and inclusive society. (Department for Education and Employment, 1998, pp. 10-11)

Similarly, OECD publications use the term 'learning societies' to refer to societies

in which equal opportunities are available to all, access is open, and all individuals are encouraged and motivated to learn, in formal education as well as throughout life. The public expects and demands high quality and relevant education for all. (OECD, 1996, p. 15)

The sentiments appear unobjectionable but the terms, *lifelong learning* and *the learning society*, as we have seen, and will find repeatedly, are used by politicians in referring to the need for an information literate society or one which is ‘internationally competitive’.¹⁵ In the United Kingdom, as Codd has suggested is the case in New Zealand, the discourse is liable to be ‘colonised’ by the powerful. Such ‘colonisation’ of meanings by the powerful legitimate the research strategies and associated methodologies that provide feedback on the experience and views of those who are the recipients of retraining and lifelong learning.

Vocationalism vs emancipation

Barnett (1997) has suggested there are four versions of the learning society: the economic approach; the enhancing quality of life approach; the democratic approach; and the emancipatory approach. While he contends that the most recent United Kingdom reports have the last of these, emancipation, as their underlying approach, he acknowledges the first and second approaches are also to be found in United Kingdom government documents, e.g. Department for Education and Employment, 1996; Department for Education and Employment, 1998.

Other commentators further argue that the “social discourse tradition in adult education is no longer to the fore” (Martin, 1999, p. 181), contending,

[w]e are increasingly exposed - and expected to conform to - the hegemony of technical rationality and narrowly conceived and economic forms of vocationalism and competence. (Martin, 1999, p. 185)

If the direction of government funding is taken as an indicator, in both New Zealand and the United Kingdom vocationalism appears to have triumphed over traditional liberal adult education.¹⁶ Government support is now directed primarily at courses which lead to credentials and enable people to gain or improve their positions in the paid workforce.

This situation, while demonstrable, may be misleading if the assumption is therefore made that people undertake further tertiary education and retraining only for economic gain. One of the noteworthy features of the current phenomenon is the number of those who embark on further education for a variety of motives.¹⁷ Few have only pecuniary motives; most enjoy the learning for its own sake as learning to learn and some enrol in tertiary courses purely for enjoyment or as an intellectual pursuit. Education can be a worthwhile leisure activity as Usher contends.

Educational activities have become consumer goods in themselves, purchased as a result of choice within market-place where educational products compete with leisure and entertainment products. The boundaries between leisure, entertainment and education have become blurred. (Usher, 1999, p. 76)

While at times lifelong learning will provide conflict for those undertaking it, it can also be such a source of satisfaction that this personal involvement can be the main reason for undertaking further study. Merrill (1999) in research undertaken at Warwick University, found that at the start of their university careers, participants saw their participation in instrumental terms. By the end of their degree course their attitudes and ambitions had changed. The learning process had been so enjoyable and personally rewarding that many wanted to continue, although the majority faced financial constraints that prevented their doing so.

Disentangling the motives of those who pursue tertiary study later in life is a complicated matter. Study may be undertaken 'as a consumer good' to use market terminology, or as a worthwhile activity in itself. This is not a new development but one in the tradition of the Mechanics Institutes which provided learning in the community a century ago. There can be no doubt that both individuals and society as a whole will benefit from 'a learning society'.

There are three areas where concern may be directed. First, some educationalists justifiably point out that the rise in vocational education has been at the expense of traditional adult education. Second are the concerns that lifelong learning is not adequately available to all, that those who have been disadvantaged fall further behind those who take up further education opportunities, increasing the educational gap. Finally questions are raised about whether, as has been suggested, there is a substantial gap between the rhetoric and reality of retraining.

Conclusion

New Zealand, like other countries has seen considerable changes in the way work is conceptualised as well the way it is practiced. Some of the changes, we have shown, arise out of global forces which have also changed work in other countries. These include the increasing 'flexibility' of employment, with its consequent division of workers into those in the core, those on the periphery and those who are external, contract workers. Other aspects of the changing world of work are a result of New Zealand's unusual position among the

world's wealthier countries as basically a producer of primary products, but a technologically advanced one.

The hegemony of discourses can also affect concepts of work, education and lifelong learning, whether globalised or local. Where the nature and purpose of education are defined by those in positions of power and decision-making, access to opportunities will correspondingly be facilitated or inhibited for those seeking retraining.

With that background, the next chapter addresses the social construction of skills, the changing nature of employment, and the resulting pressure on workers to obtain credentials as positional goods, in order to gain advantage in obtaining increasingly scarce employment opportunities.

Notes

¹ Braverman's work has its critics.e.g. Stark (1980) who finds Braverman's analysis fails to recognise the complexities of the relationship between capital and labour.

² The high standard of living Thorns noted in 1992 as being historically true for New Zealand seems now, at the start of the 21st century, to require some qualification.

³ Such a characterisation applies to specific nations in the developed world. In the newly emerging economies such as the People's Republic of China, new factories of old smokestack industries are in evidence, the pollution they produce manifest.

⁴ Notions such as unemployment and underemployment are problematic ones in traditional societies as they carry with them assumptions about an urbanised population seeking paid employment.

⁵ Thorns (1992) points out that the NIMD model is simplistic and sweeping e.g. in Australia the power of organised labour was not diminished.

⁶ Here, although Harvey is mindful of the effect on the workers of changes in the demands for skills, the term 'flexibility' is being used from the point of view of the employer, demonstrating the hegemonic use of language discussed later in the chapter.

⁷ This is not as illuminating as it would be if there was not confusion about the terms neo-Fordism and post-Fordism. The former is more often applied to the co-existence of old and new systems while the latter is usually used to describe the newer mode of organising work.

⁸ Until 1984 the role of the state in New Zealand was quite different from that in, say, the United States. This makes the application of the theory to New Zealand problematic.

⁹ See Borrie (1994) for an account of the way in which in- and out-migration in New Zealand after World War II tracks the business cycle.

¹⁰ The phrase was coined by Bruce Jesson (1989) to describe the actions and philosophy of the 1935 Labour Government.

¹¹ Not all were enthusiastic about the direction of the move which affected education as well as more strictly economic matters (see Chapter 8). The country was divided and Margaret Wilson writes of division between the Labour Party and the Labour Government (Wilson, 1989).

¹² The information in this section is based on that on the website: www.Techhistory.co.nz, and used with permission.

¹³ The first issue of the *New Zealand Journal of Science and Technology* in which these innovations were suggested, was published in this year.

¹⁴ The phrase ‘a learning society’ also used by Torsten Husen in the title of his book: *The Learning Society* (London: Methuen, 1974).

¹⁵ ‘The Knowledge Society’ is in 2001 the current most favoured term, used without a clear agreement of meaning and therefore with meaning assigned by the particular speaker at the time of speaking.

¹⁶ This argument is returned to in Chapter 7.

¹⁷ See Chapter 11.

Chapter Four

Changing lives, work and skills

Skills and knowledge are becoming more and more important in people's lives. Those with expertise and innovative ideas have more opportunities and better prospects, both within New Zealand and internationally. Increasingly, firms are looking to higher levels of knowledge and skills among their employees in order to gain advantage over their competitors. Nationally, the capacity of our people drives New Zealand's overall competitiveness and our economic and social success. Investment in developing skills and knowledge – whether by individuals, firms or the government – is therefore critical

Wyatt Creech, New Zealand Minister of Education, 1997.
(Peters and Roberts, 1997, pp. 150-1)

I believe in the equality of the sexes. I truly believe that men are just as equal to women in the work they do. I believe that a man is as good as a woman and that a man should have equal chances with a woman.

Mabel Howard (1984-1972) Trade Union Secretary, Labour MP 1943-1969,
and Cabinet Minister, speaking in Parliament, 1953.

Work and skills; visible and invisible

The previous chapter discussed the emergence of 'the flexible workforce'. The consequences for that workforce include: casualisation of some jobs and the division of employment into opportunities for those in the core, those in the periphery and those who are external workers relying on contracts (Harvey, 1989; Handy, 1989). Furthermore the most disadvantaged are further marginalised as they are outside the paid workforce altogether. In the face of the requirements of 'flexible employment' in the labour market and the consequent insecurity of employment which it creates, those in work and those seeking work must find ways to gain some control over their situation. A rational response to this is to obtain positional advantage, that is a situation of being preferred over others who are in a similarly insecure position. Retraining of any kind is one way of obtaining such an

advantage. For that retraining to be manifest to employers it must be credentialed. Thus new employment patterns have encouraged workers to reskill, look for new employment possibilities and undertake retraining as the old certainties disappear.

The main point is that almost by definition flexible employment means an alteration to the life chances of individuals and groups of workers, due to the reduced availability of conventional promotion chains and traditional career moves from firm to firm. (Department of Labour, 1989, p. 163)

Alongside the changes involved in flexible employment have been significant changes in the composition of the workforce, a key component of which has been the increase in the proportion of women entering the paid workforce.

Both these factors, flexible work and the changed composition of the workforce, have involve a challenge to the traditional construction of skills. The contention presented here will be that, increasingly, 'skills' are constructed as those which are essential for paid work and which result not from experience but from formal education and training. At the time when the concept of employment was primarily that of the employment of males as breadwinners for their families in a comparatively stable workforce, and similarly the concept of skills referred to those skills required by males for lifetime employment, the concept of education for occupational change had little cogency. With the decline in the primacy of the breadwinner and the entry of increased numbers of women into the labour market, women were faced with barriers which they countered by becoming pioneers in this type of retraining. They, like the insecure modern worker, needed positional goods to demonstrate that they were preferable employees over those already in the workforce.

This chapter suggests that the social reconstruction of skills has been along the lines which the previous argument would predict, namely that they should be credentialed skills and that the credentials should be gained in formal education and for the purpose of gaining paid work. Unlike skills obtained on the job, the skills thus credentialed need not necessarily be relevant for the paid work obtained through the positional advantage of possessing the credentials. The chapter concludes with a discussion of the new patterns in the ways in which education and employment are combined in people's lives.

The diversified workforce.

Where formerly the maximum production of goods and services required the full use of available labour, that is currently no longer the case. As Mike Moore explains:

From the 1930s through to the 1950s blue collar workers were the largest single group in the workforce. But now the industrial workforce is shrinking. By the year 2010, in most developed countries, only five to ten per cent of work will be manual or semi-skilled. Productivity and growth in manufacturing and services is being uncoupled from employment. Output has increased in most developed countries not by sweat and brawn, but by brains and technology. Japan has doubled manufacturing output in 20 years, but dropped blue collar jobs by 40 per cent. (Moore, 1993, p. 3)

An increasing proportion of the population is seeking to be part of the paid work force at the same time as changes occur in the opportunities available in the world of work. These changes in the world of work and the patterns of people's lives would seem likely to impact on retraining as a feature of the New Zealand education system and labour market. Individuals need to be able to compete for places in the paid workforce; nations declare they need a workforce with increasing levels of skills to compete internationally. Certainly much of the current debate about international competition in a global economy focuses on the provision of skills, on the need for a more highly skilled workforce if a country is to compete internationally, and on the need to anticipate further skill demands in a volatile world market. A demand by individuals and the nation for an increased level of skills in order to be able to compete would appear to be an inevitable outcome.

Since jobs for life have been replaced by 'flexible employment', much analysis suggests a consequent segregation of the workforce into the employed and unemployed. I suggest rather than trends, both overseas and in New Zealand, predict the continuing segregation of the workforce into three groups.

The top layer is composed of the managers, the technocrats who control information and therefore hold power, and some professionals. They are most likely to be core rather than peripheral worker in terms of Harvey's (1989) classification, but some consultants have sought-after skills which mean they can choose their jobs and name their price.

In the middle are the majority of workers. However, their lives are very different from the working lives of their forefathers and mothers. Again they may be core workers but without the security their fathers had in their jobs, or the lifetime commitment of their mothers to work in the home. They are more likely to change jobs and careers than to stay with the same employer for forty years and, more likely, if peripheral workers, to hold more than one job at a time.¹ Serial and concurrent employment are becoming significant patterns and are often combined with retraining as people try to maximise their opportunities and keep open their options. Holding several part-time positions at once is already common in Japanese

academic life (C. Kimura-Steven, personal communication, 2 November, 1999) and instances of multiple job holding are increasing in New Zealand (Statistics New Zealand, 1998b, 2000).² Even management is not immune as is shown by the phrase ‘accordion management’, which refers to the disposable nature of professional staff in American corporations (Castro, 1993, p.29).

Those without the skills which are in demand are at the bottom, disposable workers who move from marginal work to unemployment and back again, responding to seasonal or other fluctuations in the labour market, and whose employment is always temporary and insecure.

Casualisation

Casualisation is a dominant trend. Charles Handy (1989, p.24) predicted that with 24 million in paid work in Britain in 1989 and the number likely to be the same at the turn of the century, only 12 million of them would be in full-time employment at the later date. In New Zealand as well, more workers move in and out of work with the ‘flexibility’ that is dictated by the employer. Because the number of job seekers now exceed the number of available jobs and because society still rewards the commitment to paid work, competition is intense. Men and women take work that is available: contract work, outworking, casual and very part-time employment. Youth rates have encouraged the casual employment of teenager workers in supermarkets, replacing full-time workers (Dwyer, 1984, p. 136).

Those on benefits supplement their income when they can with legal or under-the-table work. Others have never held a paid job or their best attempt at earning a livelihood, apart from welfare is occasional casual work or participation in the black economy.³

Casualisation is associated with particularly with the service sector which has become an increasing area of employment in New Zealand.

New Zealand, in common with all OECD countries has experienced a shift towards a ‘service economy’. In 1991, 63 per cent of all employment was in the service sector. This shift has occurred as a result of steady job losses in the manufacturing sector and, to a lesser extent, the primary sector. Job creation, on the other hand, has been overwhelmingly concentrated in service sector industries. These industries encompass an extremely diverse group of activities. ...Jobs within the service sector vary considerably in quality and pay. (W.L. [Larner], in Le Heron & Pawson, 1996, p. 93)

The growth of the proportion of jobs in this area has led to an increase in the amount of work which is casualised. Many positions are temporary, seasonal and available only at

unsociable hours as well as being poorly paid. Larner also points out that many of the new jobs have characteristics once associated with women's work.

They require attributes such as caring, sociability, and 'people skills'. Astrin (1992), for example, shows how developments in technology in the finance sector have provided the framework for a new pattern of work organisation. The shift to electronic banking in New Zealand has involved a transition from a basically male clerical/machine-operator type workforce to a workforce that is essentially concerned with sales and marketing. (W.L. [Larner], in Heron & Pawson. 1996, p. 99)

Employers favour outworking because of its 'flexibility'. They do this because they do not have to provide premises nor pay workers' salaries and because, in circumstances where the 'product' can be transmitted electronically, it can be produced by isolated employees.

The fruits of changes in the labour market are unevenly distributed with those with the skills which are sought after in highly paid jobs; those in the middle more vulnerable to shifts in demand; and at the bottom the most vulnerable, the disposable workers, those who have only part-time or seasonal work because their blue-collar skills have little value in negotiation. As further changes occur, workers need more than initial education and training to compete. In the search for meaningful and secure employment, further education, in the form of upskilling and reskilling, brings comparative advantage to those who have already spent part of their lives in the workforce. Mature workers as well as entrants to the workforce need new skills and credentials.

From traditional to credentialled skills

At the beginning of the twentieth century, skills in New Zealand were, in general, seen as being possessed by males and were gained in youth as a result of apprenticeship or other on-the-job training, or, more rarely as, for example, in the case of the professions, as a result of formal education. Few possessed formal qualifications but skills and/or qualifications gained in adolescence and early adulthood were sufficient to carry a working man (the word is deliberately chosen) through his life. His skills would be recognised in their performance but there were less often an official imprimatur in the form of a credential. But although many of those were skills possessed no credentials or formal qualifications, this was a society rich in people with skills. Only in retrospect is the richness of New Zealand's skill base unrecognised and unacknowledged, rendered invisible by changes in ideology.⁴

Now workers are not only required to be competent in the skills and abilities required for their jobs but they are also expected to have qualifications and credentials which testify to

this when they take up a position. This new credentialism is a modern manifestation of the social construction of skills. As I will show, credentialism can mean that qualifications, rather than necessarily new skills, may be what are required for entry into an occupation. Increasingly, the verification of skills is confined to those skills acquired in institutions through the education system and awarded credentials.

This differs markedly from the traditional valuing of abilities transmitted by one generation to another through example and observation. The skilful seamstress or adept carpenter or green-fingered gardener could all earn high regard for the quality they demonstrated in the performance of their tasks. Such recognition applied to both work place or home-based skills, although those which resulted in monetary benefit to a family were always more highly regarded than purely domestic skills. Now recognition is often linked to a trade or professional organisation, through membership of, for example, the Master Builders' Association, or being registered as a plumber or possessing the credentials of a financial adviser.

Increasingly people start paid employment at later ages, having first 'invested' in an extended period of preparation and learning. As a consequence of the belief that changing technology has increased the skill requirements of the workplace, the requirement for an increase in education and training needs has increased. Sometimes the need for new skills is clear; at others it appears as though an incremental creep in the requirements for qualifications has overtaken the real need for skills, as is discussed later in the chapter.

The social construction of 'skills'

To understand upskilling and reskilling it is necessary first to understand how skill itself is socially constructed. In general, work performed by women has been regarded as less skilled than that which is primarily performed by men. As has been suggested and will be further explored in relation to the special characteristics of women's work, this is an oversimplified, somewhat arbitrary view which ignores the social construction of the concept of skills. Therefore, in the process of exploring the nature of this concept I will concentrate on women because women's (re-) entry into the paid workforce illustrates the attempt of 'unskilled' workers to find a place for themselves as valued employees.

Often the terms, 'skilled' and 'unskilled work', are used as if there is general agreement about their meaning; the agreed idea of a skill fits with the relevant dictionary definition of "Practical knowledge in combination with ability; cleverness, expertness" (*The Oxford English Dictionary*, Vol IX, 1993, p. 138). In practice the distinction between skilled and

unskilled work has been increasingly applied so that skilled work is seen as that for which training is required, while tasks which are carried out, either through the education system or on the job, without prior formal instruction or learning, are considered unskilled.

The consequences of this construction are manifest in various forms, some of which affect both men and women. One of these is credentialism, where skills exist but are not recognised in terms of qualifications and thus are undervalued. Another is that the view of skills involved in a trade or profession is affected by the social standing of the occupation with the skills associated with higher status occupations being more highly regarded. Penn (1985) discovered that skills associated with occupations for which there is no formal training have been undervalued. Turner's research suggested that whether or not entry to their occupation is deliberately restricted will affect whether workers are considered skilled or unskilled (1962, p. 14).

In her study of youth training in New Zealand in the 1980s, Higgins points out that the social construction of skills, as of work,

relates to gender. A significant degree of occupational segregation is shown in the work of Gwartney-Gibbs (1988). The study of Craig et al. (1982) showed that in many firms there was no grading of women's jobs despite difference in skills. All were paid the same. Craig et al. found a general tendency among firms to classify feminised jobs as low skilled and assign them to low pay grades largely irrespective of job content and the worker's skills. Significant for further work on strategies of Occupational Control are the categories defined by Witz (1986) in her discussion of 'closure' and 'demarkation'. The former, closure encompasses the techniques of exclusion and solidarism and reinforces that the route to skills is socially constructed; women seen as having innate qualities not skills. (Higgins, 1993, p. 309)

This perception is expressed by Jane Jenson as 'Women have talents, men have skills' (Wood, 1989, p. 151) and as a consequence of this view women are still often ignored in discussions about changing work patterns. Even in the process of retraining and of changes in skill levels, the discrimination in the perceived levels of skill can be seen. Commenting on struggles by different groups of workers over reskilling, Higgins notes that whereas machinists lost out, tradesmen did not.

In the occupations studied the ability of workers to maintain skill levels ... was found to rest heavily on their organisational strength. And, as might be expected, gender played an important, but by no means exclusive role in this. (Higgins, 1993, p. 310)

The construction of skills is still gendered but less than previously (Walby, 1989). In 1910 Using a typewriter was deemed a skilled job and therefore was regarded as one appropriate to male workers. As women moved into such work it dropped in status. The converse pattern has also been observed. During the restructuring of the newspaper printing industry, men who had previously been linotype operators, had the option of moving to being keyboard operators, 'unskilled work' since it was normally performed by women. When they did that they then wanted to claim it as 'men's work' (Hill, Couchman & Gidlow, 1994). Now when computer skills are widespread among male and female, old and young, they are not regarded as unusual unless the work is outside that performed by most female office workers.

So not only is 'skilled' work more highly regarded and rewarded than 'unskilled' but because historically, skilled work has been the particular preserve of men, more of the work that men do has been considered skilled than that performed by women. Women's lack of organisational power as workers reinforces this. (Higgins, 1993, p. 310)

Unpaid and unacknowledged work

Traditionally few women in New Zealand were employed in well-remunerated career positions; most women in the paid workforce were poorly paid, and their participation in the workforce regarded as expendable. Thus, although round the world women have always worked at paid and unpaid work, public perceptions of work have usually been of male employment and New Zealand has been no exception (Hyman, 1980; Nolan, 2000; Taylor, 1985; Waring 1983).

The aim of the government was and is to organise an internal economy that will distribute to every person able and willing to work an income sufficient to provide *him* and *his dependents* with everything necessary to make a 'home' and 'home life' in the best sense of the meaning of those terms,

declared Walter Nash in his Budget speech of 1936 (NZPD, 1938, Vol. 251, p. 606, emphasis added), unwittingly revealing his assumption that income earners were male and probably also financially responsible for others in (their) households. Nash's statement, far-sighted and visionary in other ways, is also significant not only for its correlation of 'person' with a man supporting a family but also for the complete absence of any reference to women. While this is not surprising for the time, the use of the male term alone serves to document the invisibility of women as paid workers.

The undervaluing of women's work and the invisibility of much of the work that women do, have been at the same time both the key disincentives and the key motivators in the growth

of retraining. Many women, before embarking on retraining, have had to first overcome the views which they, and others, have had of their skills being negligible or irrelevant. The process of retraining for paid employment has thus become itself a necessary vehicle in the creation of visibility for women's skills.

Traditionally work has been seen in the national accounts, in policy statements and in the collection of statistics of the numbers of employed or unemployed, as that which leads to production for exchange and not for use in the household (Waring, 1983, 1988; Hyman, 1980; Nolan, 2000). 'Work' is thus what is done for wages, salary or other reward. In an economy based on money this view takes little account of the informal exchange of goods and services when women care for one another's children or of the meals cooked for members of the household. It even ignores help given outside the household as when a meal is prepared for an elderly neighbour or a friend's child is taught to swim. There may or may not be direct exchange in these cases. When there is an exchange of money suddenly the work may be recognised. Providing board for a friend or member of the family will be totally ignorable activity unless money changes hands. If payment is made and the service declared as a money earning activity then it becomes an entry in the national accounts but if this does not happen then there is no recognition that any work has been performed. There are still women who say, "I don't work", although their days are full of purposeful and creative activity, because they have accepted the definition of work which equates work with paid employment. As Marilyn Waring points out:

The structure of systems of national accounts reflects the economic theory of the day ... By consistently seeing only the behaviour of males or assuming that it somehow accounts for female behaviour, planners have only half the information base needed for determining policy. (Waring, 1983, p. 74)

This equation of work with paid employment can therefore be seen as a construct which ignores the unpaid caring work of many kinds done by women for their families and members of the communities in which they live.

There can be few generalisations that hold as true throughout the world: unpaid domestic work is everywhere seen as women's work, women's responsibility (Taylor, 1985, p. 3)

A consequence of this equation of work with paid employment therefore follows when a women makes the change from paid to unpaid work. Despite the skills she may have been developing and exercising, she will be regarded as unskilled and untrained. As we will see in Chapter 8, traditionally for many women in New Zealand society, and for some women

still, there has been a need for considerable ‘consciousness raising’⁵ before they see themselves as potential members of the paid workforce. The durable effect of the invisibility of unpaid work and the skills involved may be seen by the fact that there are still some women who may not regard themselves as potential members of the paid workforce and therefore worthy of retraining. Negative experiences of schooling and of the workforce have meant that they are not aware of their potential to learn. Official measures and even statistics may reinforce this sense of ineligibility for upskilling or reskilling.

So, while some men may undertake ‘women’s work’, work for women has often had different meanings from the way ‘work’ is usually defined. The labour they undertake is frequently not paid, not recognised in the GNP, and not regarded as “not being ‘real’ work at all – *because it is unpaid*” (Taylor, 1985, p. 5).

Women’s unacknowledged skills

The invisibility of women’s unpaid work is neatly matched by the invisibility of the skills that women exercise in their paid work. This congruence occurs as follows. If the work someone does is invisible then the skills they exercise in performing the relevant tasks are also invisible in a monetary framework. The skills only become visible if they are exercised in paid work.

The perception that women are ‘unskilled’ has meant that they have required ‘upskilling’ or ‘reskilling’ before entering or re-entering the paid workforce. This perception that women’s work is unskilled has applied particularly to tasks that may have been learnt in the home. The distinctions in pay rates between house cleaning and painting, or child care and carpentry, are not those based on the degree of skill required, but in the way in which the skills were acquired. This social construction of what constitutes a skill has been affected by whether special instruction, such as that given through an apprenticeship, has been given or whether skills have been acquired without formal training.

This is reinforced by the distinction between the types of work done in the home and those which society is willing to pay to have done. Some of women’s traditional household duties are now being purchased outside the home as services. This continues the trend of home-based work, done by women, or in affluent homes, by female employees, moving from the home into the public domain of paid work and thus being produced by skilled, paid workers. Just as children attend school instead of being taught by governesses, they are now cared for at a preschool rather than by a relative or nanny. Meals are prepared, purchased and eaten outside the home; clothing is manufactured rather than home-sewn; bread is bought rather

than baked at home; clothes are cleaned at a dry-cleaning establishment. The growth of the service economy has moved the lives of women more firmly into the public area, turning them into employees rather than home workers. In the process the skills involved have received somewhat greater recognition than formerly since they are now exercised in the paid workforce.

Skills and the composition of the workforce

The significance of the distinction between skills which are recognised and those which are unacknowledged becomes clearer when the changing nature of paid work is examined alongside the composition of the workforce. At the turn of the nineteenth century in New Zealand most of those in the paid workforce were men and most of the tasks performed there were seen as 'men's work'. Men undertook manual labour, including farming, commercial transactions and filled the professions. Women's work was done mainly in the home or, largely unpaid, in the community. Very few married women held full-time positions and in many areas of work they were not permitted to do so. Even in the latter part of the twentieth century women were second class workers and a disposable workforce. When servicemen returned from the Second World War, married women were no longer permitted to hold the jobs they had undertaken during the war (Montgomerie, 1992; Nolan, 2000). While an unmarried woman might work in an adjunct position in a factory or shop or someone else's household, she was not regarded as a breadwinner and, if unemployed, was not recorded on the unemployment register. Thus when out of work she was not regarded as being a potential member of the workforce as a man would have been. There are, therefore, not only links between the conception of what is skilled work and who performs it but also connections between these and the way in which the workforce is socially constructed. The workforce is seen as consisting of those in paid employment and, as it expands or contracts the skill of individuals will be constructed differently depending whether or not they are in paid work. Official statistics consequently record only the workforce participation or unemployment of those who fit the agreed criteria for participation.

Employment and unemployment

Whether it focuses on employment or unemployment, research and literature relating to employment has taken the male worker as the norm and, except in the growing literature on unpaid work, women have been frequently ignored or treated as a special case.⁶ The 'full employment' of the 1950s in New Zealand' when jobs for all were assumed as of right was actually full *male* employment.

The term 'jobs for all' is less encompassing than might at first appear. It disguises the predominant cultural formation upon which the long boom economy functioned: the nuclear family, in which the male performed paid work and the household depended on the unpaid work of women. Women did of course undertake paid work, and certain occupations were predominantly staffed by women, but the majority of married women were not in the paid labour force. Rather it was their role to undertake 'reproductive' work: to raise the next generation of workers and to cook, wash and clean for males engaged in 'productive' work. (E.P. [Pawson] in Le Heron & Pawson, 1996, p. 90)

As a gender issue, unemployment is particularly revealing with regard to the way work and skills are conceived, because unemployment is about non-participation in paid employment, and paid employment is about work in the public domain. The woman at home has not been a visible figure as she belongs to a private world. In the public world, such as in the collection of statistics and in the literature on unemployment, women were traditionally invisible. Women were not even regarded as unemployed.

Statistics on those who were seeking work were previously recorded in New Zealand through the Department of Labour. Gaining an unemployment benefit was a two part process, the first stage being to register as a job seeker and the second to apply for an unemployment benefit. As only the second part had direct financial returns and most married women were not eligible for benefits many women saw no point in registering as job seekers. This policy meant that women were under represented in official statistics, or even totally ignored, and the problems they faced received inadequate attention (Shipley, 1982a, 1982b).⁷

Another difficulty for women facing unemployment has been that of deciding whether in fact they were unemployed. Men have faced this problem much less frequently because for them there has generally been a clear distinction between being in work or out of it but for women there is again the confusion about the nature of work. Even a woman who is not in paid employment and is job hunting may not define herself as unemployed but as a mother or a beneficiary. The presence or otherwise of children is a significant factor. Those with no children and consequently with life patterns which are closer to male patterns are more likely to consider themselves unemployed.⁸ Those with responsibilities for the care of others may not see themselves as unemployed because they are not without work. In order for them to change their lives by undertaking retraining, women may have first to change their orientation to the world of work and even their conception of their place in society.

When those officially in the workforce were only men and a few women, and the many women whose work was unpaid or part of the informal economy were invisible, then the official workforce included a much smaller proportion of the population. Consequently figures for workforce participation and the numbers of unemployed were based on different groupings from those currently in use. This makes it very difficult to make comparisons across time about workforce participation figures, or percentages of unemployed, or the numbers of those actively seeking work. Women's work was thus often unacknowledged.

To summarise, skill is not a culturally and socially independent construct. It depends crucially on the way in which a given society at a given time sees the abilities of people as being of use. In the contemporary world the situation of women shows clearly that skill is linked to aid employment.

Changing family patterns

A further factor in reconstructing and redefining work and skills and one where again women provide a clear illustration, is the way in which family patterns in New Zealand have changed over recent years. Alongside the changes in patterns of employment, changes in the composition of households and family structure were occurring and impacting on workforce participation. Such changes in family structure have an immediate and significant impact on workforce participation because in New Zealand the household, whether a nuclear or an extended family, has almost always been the economic unit. The traditional nuclear family was never the only family form in New Zealand, with three generational and extended families significant particularly for Maori, and one parent and step families resulting from death and desertion and remarriage. But the normative family, comprising "male as earner, wife as non-earner and three or more dependent children" was the basis "upon which the welfare state was predicated" (Simpson, 1990, p. 99). This is again a significant social construct.

Since World War II patterns have further diversified with more couples choosing co-habitation over marriage; more people choosing to be childless by choice or to delay having children; the public emergence of same sex couples; an increase in divorce and remarriage rates and consequently in single parent and blended families; the modern phenomenon of single people sharing flats and houses; and, according to recent census figures, more and more people living alone (Statistics New Zealand, 1977).

Whereas previously one or more of the householders in a nuclear or extended family, usually an adult male, sometimes the married couple, took responsibility for the economic

security of the others now, increasingly, this task is shared among the household members. No longer is there likely to be just one breadwinner in the house; multiple wage earners in a household are now common (Statistics New Zealand, 1998b, 2000) even though each may not earn a living wage, let alone enough to provide for the whole household. Older children in a family, even while studying, will earn as well (Statistics New Zealand, 2000). Or the household may be composed of adults, whether single or partnered, taking individual responsibility for economic well-being. Since the 1960s we have witnessed the decline in the primacy of the breadwinner and the diversification of the labour force. As the living patterns and the composition of households have changed, so too has the conception of the earner and the composition of the workforce. Most people aim to be wage earners and expect, as adults, to be self-supporting.

Raising the school leaving age and encouraging young people to continue with tertiary education has not stopped them from wanting or needing to earn, and many school and almost all tertiary students hold part-time as well as holiday jobs (Statistics New Zealand, 1998b; Statistics New Zealand, 2000). Most of them are now members of the paid workforce and those who are not often job seekers or discouraged job seekers.

Government provision for students may be predicated on the assumption that students are dependent on their parents until the age of twenty five, but they themselves and their parents do not wish for that kind of dependency.

The expanding workforce

A further factor in the social construction of work and skills has related to credentialed training. The (re)construction of skill as having to do with areas of competency for which a person is explicitly trained, has received credentials, and then is paid, has gradually replaced older constructions. Paid employment is seen by more people than ever before as a means of economic support, a way of being involved in society, and as a goal and a source of meaning in life. Whether young or old, female or male, single or partnered, parent or offspring, most individuals are, or seek to be, part of the paid workforce, and increasingly seek the skills that will enable them to obtain or keep that place, through upskilling or reskilling.

Increasingly identity is bound up not as much in one's position in society by class or family membership, as by membership of (or omission from) the labour force. Margaret Wilson, addressing the status of women in 1984, illustrated this by referring to the position of those without paid work.

For the great majority of New Zealanders work occupies not only a large percentage of their time but it also influences their status in the community, their standard of living, and the quality of their lives. The importance of work to the individual is best illustrated by the position of those persons who do not have paid employment, for example, women employed at home, and the growing number of unemployed. It is this increasing number of unemployed persons that brings into sharp focus the importance of work to the well-being of the individual as well as to the security and stability of the community. (Wilson, 1984, no page number)

The majority of women are now continuing members of the workforce, except for brief spells of parental leave (Statistics New Zealand, 2000). The changing world of work has thus had consequences for societal structures, particularly for the fundamental unit, the family. As paid work has moved from being largely the prerogative of the family breadwinner it has become ever important for economic self-sufficiency and for the identity of the individual. The move from a household-based economy to that of the individual being responsible for his/herself, or a couple sharing this responsibility economically as well as emotionally, has resulted in democratisation and the demise of pater familias. No longer is the norm that of a 'head of the household' who is economically responsible for wife and children. So, as there is an increased demand for training and credentials resulting from increased participation in paid work, there is consequent increase in upskilling and reskilling. This in turn, changes people's lives and life patterns.

Upskilling the workforce

The proportion of the population actively or passively in the paid work force has grown (Statistics New Zealand, 1996, 1997).⁹ There are three significant factors connecting this and the social construction of skills. First, there have been more people seeking work. Second, there have been insufficient jobs for them all. Third, and as a result, workers needed to gain comparative advantage in the job market while at the same time employers claimed that a skills shortage existed, a situation which is explored in Chapter 5. Given this qualifications and of education as a positional good. Whether currently employed or not people are likely to pursue retraining.

The Government has noted that

investment in the upskilling of New Zealand's adult population will become of greater importance as older age groups increase in size, and as, the rate of participation in tertiary education and training by school leavers slows. (Ministry of Education, 1993, p.7)

However, although there is talk of deskilling and reskilling, to date when there have been calls for a more highly skilled workforce, government measures in New Zealand have tended to focus on encouraging young people to acquire basic skills¹⁰ rather than on upskilling the existing workforce. With this policy emphasis has been on tackling unemployment rather than on economic development and employment. The many government training schemes of the 1970s and 1980s (YPTP, STEPS, Access, TOPS) all provided training for the unemployed, particularly the young and unskilled. They catered less for the older employee made redundant and hardly at all for the person who wanted to extend their skills range or change direction. New Zealand has been slow to recognise that not only do youth need to be trained in skills but that, if the demands of the workplace are to be met, measures must also be taken to train the existing workforce in new skill areas.

This has been recognised in the USA for a decade. A 1991 survey of 700 CEOs there found the biggest human resource issue to be the shortage of skilled workers because of the

new vulnerability of jobs to international pressures as the information age transforms work practices and structures ... Given the same 80 per cent of those who will be working in 2000 are already in the workforce, the quality of on-the-job training will largely determine how competitive that workforce becomes. (Yarwood, 1993, pp. 55-56)

As I will show in Chapter 11, New Zealand workers appear to be aware of this imperative but government, employers and educational institutions have been slower to accept their responsibility for upskilling the existing workforce.

Skills as 'positional goods'

Working out what skills are needed by the economy or by the individual seeking to enter the workforce or to change jobs is not a simple task. However the task may also be in part irrelevant since employers may be using qualifications as a screening device rather than as an indicator of the skills they require for the positions they have available, and it may be further complicated by the tendency to confuse skills and qualifications.

Simon Marginson produces a telling argument in this regard showing that in Australia, the shortage of employment opportunities allows employers to set ever higher qualification benchmarks for selecting employees. This occurs regardless of whether the skills that are required to obtain the credential are matched with the job for which the person is being selected. The applicant will be appointed not because of their possession of the skills and qualification/s necessary for the job, but because this qualification, as a 'positional good' gives them an advantage over other applicants. Positional goods is a term applied to certain

needs Keynes referred to as being “relative in the sense that we feel them only if their satisfaction lifts us above, makes us feel superior to, our fellows” (Keynes, 1972 [1930], p. 326, quoted in Marginson, 1996, p. 25).

Marginson applied this to tertiary qualifications, pointing out that:

Education produces positional goods in that it assigns people to social positions: it determines selection into the professions and, increasingly, the upper echelons of management. Positional goods in education are those places in education which provide students with relative advantage in the competition for jobs, income, social standing and prestige. (Marginson, 1996, p. 25)

This suggests that employers’ desires for an ever increasing credentialed workforce must not be confused with a shortage of skills in job seekers. Job seekers may have the skills required for a job but may not be appointed because people with more or better credentials are available to be selected for the position.

There can be little doubt that an increase in qualifications even for entry level jobs has become a feature of the New Zealand labour market, thus increasing the demand for qualifications. For example, though the manager of the company employing tour guides may have entered the industry straight from school, applicants for those seeking a position with the company are now likely to hold a polytechnic or university qualification in recreation. On entering their profession in the twenty-first century the primary teacher and nurse will hold degrees although those in positions of authority, who entered it earlier, may not have such qualifications. And so the person seeking to change occupations or re-enter the paid workforce will find that he or she is also faced by the need to first upgrade their qualifications.

This situation is acknowledged also in the OECD report, *Redefining Tertiary Education*, which points out that

In several countries [across the OECD] graduate unemployment rates have reached significant levels and there are in many cases lengthy periods between graduation and first jobs (OECD, 1997). ... In recent times, young people with no, or only elementary, qualifications went to agriculture, public works or manual labour; those with vocational secondary qualifications went to industry or crafts; those with general secondary qualifications, to private services; and tertiary graduates, to public employment and leading professions. (OECD, 1998, p. 38)

The report further suggest that with changes in these sectors, falls in demand for labour in the industrial and agriculture sectors, the expansion of the service sector, new openings in

private sector employment, and the transformation of the public sector, “graduates can no longer take traditional graduate jobs for granted” (p. 38) and “forecasting future employment prospects for various categories of tertiary graduates becomes increasingly difficult” (p. 39).

Education as a positional good

Regardless of whether further training is actually needed for the jobs available, the demand for further training is a continuing one. As Marginson further comments, referring to the work of Husen (1979),

In the context of education as a positional good - and arguably, this is the dominant role of education in modern societies - the growth of mass higher education must go hand-in-hand with enhanced educational competence. (Marginson, 1996, p. 28)

The situation in New Zealand and other OECD countries is similar to that in Australia, where:

the number of students in higher education has been expanding as a proportion of the population since the mid-1950s. A growing number of students/graduates have found themselves competing for positions of social leadership which have increased more slowly ... Unemployment has increased the penalties attached to early school leaving, driving the growth in educational participation, so that more than 60% of teenagers now aspire to university. As the labour markets become more crowded at the higher levels of educational qualification, the trend to credentialism becomes self-reinforcing. Abetted by educational institutions, students are forced to still higher levels to compete. For example, course-work higher degree students doubled in the four years after 1993. (Marginson, 1996, p.28)

Yet both individuals and governments share concerns about a shortage of skills. Education and training are seen as the key to upskilling and increasing the skills of those in the workforce. Like other government, the New Zealand government has recognised the need for retraining in many official statements like this one:

People are going to have to retrain several times during their working lives. If change is constant, education and training must be too. (Ministry of Education, 1993, p. 7)

Since it is not only skills that are being required, but credentials, education for occupational advantage is the motivation for acquiring these.

Belief in the link between skills and the growth of the economy is exemplified in the quotation from then Minister of Education, Wyatt Creech, which opens this chapter. This

belief in the importance of skills is crucial for the pursuit of retraining to be activated, whether by governments seeking to improve the national economy, or by individuals seeking to improve their place in the economy. Thus the concept of skills, the idea of what constitutes a skill which is useful in the workplace and for which employers will pay, is of critical importance to an investigation relating to labour markets, the changing nature of workforce participation, and thus to retraining.

Revaluing skills

What are the consequences of the way in which skills and work have been reconstructed in the recent past? Let us suppose that, as far as their social value is concerned, there exist two sets of skills, those skills used in the paid workforce and those skills exercised outside of paid employment. Let us also suppose that there are two ways of acquiring skills: either in institutional settings or 'on the job'. The valuation of these skills has traditionally been that those used in paid employment were more highly valued than those used outside it. Skills acquired in institutional settings were more (perhaps slightly more) highly valued than those obtained on the job. Women traditionally had skills which were exercised outside of the paid workforce and which had been acquired on the job. Their skills were thus valued at the lowest level.

With relatively high levels of unemployment and the decline of occupational opportunities for those trained on the job in poorer paid occupations in the Western economies, credentials acquired in institutional contexts have come to be the primary way to access paid employment. Credentials are therefore more highly valued for a greater number of people than formerly. In the process non-credentialled skills have been revalued downward. The increasing significance of credentialism provides two significant parameters in assessing the social value of skills. Are these exercised in or out of the paid workforce? Are they credentialled or not? In terms of a hierarchy of value the highest valued skills are those which are credentialled and exercised in the paid workforce. The lowest are those which are uncredentialled and not exercised in the paid workforce.

Given this reconstruction of skills, women who had been working at home were now doubly disadvantaged since their entry into the paid workforce required them to undertake credentialled learning to gain access to the paid workforce. They thus pioneered education for occupational change.

Note that it does not follow from the above analysis that uncredentialled skills, or those acquired without institutional learning, are of little use of value in paid or unpaid

employment. They clearly are. Good tradespeople without formal training are keenly sought and well paid. Nor does it follow that credentialled skills are necessarily directly useful in paid employment. Marginson quoted earlier suggests that that is also not the case. But the changing ideology which has been documented in this chapter is clearly of significance if we are to understand the way in which education for occupational change takes sustenance from current ideology. In Chapter 5, the factors which we have outlined here will be shown to have played a significant role in the debate as to whether there is a shortage of skills in particular occupational areas, as that debate has in motivating individuals to seek to upskill.

Learning alongside earning

The changes in the workforce which are creating a greater diversity in employment and the demise of lifetime employment in the same occupation, will result in a change in the balance of the roles played by work and study in people's lives. Rather than being a preparation for work, study exists contemporaneously with employment, whether as upskilling when, for example, a medical specialist attends a course or as reskilling when an adult enrolls in further education. The combination of earning with learning, of study combined with part-time work in several jobs, is a new version of the combination of employment and continued learning which has always existed. What is different is the increasingly formalised and institutionalised nature of the learning activity. Instead of upskilling on the job or in a different job happening incidentally, it now often involves enrolment at an institution and the gaining of a credential. So the balance of paid employment and education has shifted in the lives of many people. Lifelong learning in a vocational sense has become a new reality.

This vocationally focused learning co-exists alongside, rather than replacing, learning undertaken by individuals for non-vocational reasons. Scott suggests that:

Mass systems shrink the years of structured employment, by delaying entry into the labour market and offering meaningful opportunities to many employees whose jobs do not provide them with sufficiently stimulating experiences. Under post-industrial conditions mass higher-education is as important a form of socio-cultural consumption as investment in high technology skills. (Scott, 1995, p. 114)

Traditionally continuing education, the liberal, humanistically motivated type of learning, is still most commonly, but not exclusively, taken up by those educated. Ironically this education can be regarded as a lifestyle activity and even as a consumable. Just as it has become fashionable among a section of the population to purchase experience such as

adventure tourism instead of consumer goods, so continuing education is the choice of a sector of society. Like the leisured classes of earlier centuries, this élite who have time and money, do not need to earn and so can choose to learn. So the leisured élite learners exist alongside those who learn to earn. Providers include the WEA, university non-credentialed courses, the kind of self-education offered by reading groups or societies,¹¹ the current examples of educational tourism like Elderhostel, or U3A (University of the Third Age) which fill an important role in the life of those who have retired from paid employment. For such groups education is purely recreational.

While flexibility in the workplace works primarily for the benefit of employers who thereby gain a pool of available labour to whom they have few obligations, it also makes possible a pattern of combining paid employment and study that can be emancipatory for some.¹² 'Flexible' employment, because it provides no security, threatens workers who are dependent on its provision (Le Heron & Pawson, 1996). But for those for whom full-time paid employment is discretionary, not essential, flexible employment patterns may provide opportunities for a life which includes study for its own sake (Davey, 2001). Lifelong learning, therefore, despite the attempts of politicians to link it to economic development retains its emancipatory potential alongside vocational aims. I will show in Chapter 11 that individual adults make their own decisions to retrain and enrol for tertiary education for their own reasons and of their own volition.

Conclusion

As the last century progressed it became difficult in the developed world to separate training and retraining from paid work since increasing amounts of work appear to require not just on the job training, which work has always required, but training of the formal, institutional kind. For those who are disadvantaged, retraining may continue in the traditional form of government schemes for employment skills. At the beginning of the twenty-first century, for those who are already educated lifelong learning appears for many different reasons and in many ways. The changing patterns of people's lives have meant that the universal provision of education has moved from primary schooling to secondary schooling and such provision is on the horizon for tertiary and lifelong learning and education in New Zealand. Portfolio lifestyles may become the norm for increasing numbers of people. Credentialed lifelong learning appears to be the next stage in all our lives.

Concluding Section 1

Section 1, which concludes with this chapter, introduced the largely unrecognised phenomenon of education for occupational change, the methodological frameworks for the study and the hegemonic nature of much discussion about educational policy. In drawing attention to factors which have affected the working lives of New Zealanders, it noted both global influences and the importance of local factors which suggest that retraining will have a distinct nature in New Zealand. The changing nature of the workforce reflects and reinforces the changing lives of those who work and study.

The next three chapters which make up Section 2 are concerned with ideology, history and policy relating to the nature of education in New Zealand. Section 2 begins with Chapter 5 which investigates the contention that lifelong learning has, as its purpose, the acquisition of skills in the service of the national economy. Chapter 6 identifies the special features of tertiary education in New Zealand before Chapter 7 charts the influences which have affected tertiary education policy since 1984.

Notes

¹ Many examples spring to mind of those whom I have met who have adopted such a lifestyle, whether from choice or from necessity. Most telling in terms of the acceptance into the mainstream of the holding of multiple jobs as a career, is the example of a television advertisement for deodorant which features a young woman, protected by this product, in her busy but desirable life as she rushes between one and another of her three paid jobs.

² 'Permanent part-time work' was introduced in New Zealand by the Labour Government in the 1980s but few true examples now exist. Permanent part-timers are more often employed on contracts for specified period than with continuing job security.

³ This lack of workforce participation is the situation now in areas of New Zealand with high unemployment rates such as Northland.

⁴ This discussion is returned to in Chapter 11 during the consideration of the Recognition of Prior Learning. Originally greeted as emancipatory, RPL in fact acts restrictively because skills which are not credentialled tend to be hard to recognise.

⁵ This term was used especially in the 1970s to refer to the increase in confidence many women needed before they entered the paid workforce. Consciousness raising groups enabled women to discover that the 'problem' was social not purely individual.

⁶ Even in the 1990s *Unemployment in New Zealand* (Shirley *et al.*, 1990) revealed that male workers are the norm by having a separate section on women and labour market policy whereas there is no such section for men. Similarly there are eight references to women in the index but none for men because, of course, except where it specifies otherwise, the whole text is about them. This reflects not on the authors of the study who show awareness of the implications of gender differentiation in the labour market but on the organisation, both social and political, of that market.

⁷ Susan Shipley's study of women's employment and unemployment in Palmerston North showed that "Of a representative sample of 102 females wanting work in Palmerston North in June, 1981, only 4 were registered at the Department of Labour and would appear in the unemployment statistics, while the remaining 98 were unknown – socially 'invisible'." (Shipley, 1982a,p.xiii)

The concentration of women in part-time work also meant that they were more easily overlooked.

"There was a much higher level of disguised unemployment among females than males: females comprised two-thirds of disguised unemployed wanting full-time work, and five-sixths of those wanting part-time work. Unemployment rates adjusted to include disguised unemployment, for the

full-time labour force were females 8.5%, and males 4.3%. The unemployment rate for the part-time workforce was 20.1% - five times as high as the rate for the full-time workforce.” (Shipley, 1982a, p. xi)

Measuring unemployment by the number of those in receipt of unemployment benefits also underestimates the number of women. A third measure, the census count, has the advantage of being more responsive to people’s own definitions of their employment situation and the disadvantage of only being recorded every five years. The most recent, and now the most widely used, measure of unemployment is the Household Labour Force Survey which quarterly provides figures based on a standardised survey of a defined group of households.

⁸ I can verify this as a result of my experience with the women in the Next Step Centre courses which are the subject of Chapter 8.

⁹ Some of this growth is more apparent than real in that in the past many who were ignored in official unemployment statistics would have taken jobs if they were available. Nevertheless it is clear the number of those interested in being employed in the paid workforce is greater than ever before.

¹⁰ Higgins (1993) has pointed out that:

“Efforts to create a flexible workforce have made training in ‘generic’ and ‘transferable skills’ a focus of training programmes in the United Kingdom. This approach has also become part of the New Zealand training scene but to a lesser degree. Deardon has criticised the concept arguing that all skills exist within a context. ‘Simply because good judgement can be exercised in both the stock market and in landing a hot air balloon, it does not follow that there is some general skill of ‘good judgement’ which is common to both and in which we could be trained free from any particular context’ (Deardon, 1984).”

¹¹ Women’s organisations like S.R.O.W. and F.U.W, which conducted some of the social research used in Chapter 8, are examples of societies which provide education directly or indirectly to both their own members and society in general.

¹² Those who have well-paid work are most likely to be able to choose to work part-time but some couples combine their resources so each can spend time studying. Others make a ‘lifestyle’ choice to maximise learning, rather than earning, opportunities.

Chapter Five

Investment in skills and the dream of shared prosperity

In theory, the medieval university was open to all comers: it was a place of general resort, and the sending of a student to a university was a financial investment from which a tangible return was expected.

(Cobban, 1975, p. 225)

As Western countries across the globe have moved away from the smokestack capitalism of the earlier, industrial age, repeated references (principally, but not exclusively, by politicians and corporate élites) have been made to a 'skills crisis'. This claim - in its various guises - is intimately related to the notion of retaining a competitive (economic) edge in a rapidly changing world. Our wellbeing as a nation, it has frequently been asserted, depends on our ability to compete with other countries in an increasingly sophisticated technological environment (cf. O'Rourke, 1993; Creech, 1997). Education, it is almost always noted, ought to be much more explicitly geared towards the 'needs of the economy' and in particular the need for more skilled workers in industries reliant upon advanced technologies.

(Peters & Roberts 1999, p. 16-17)

Despite the rhetoric, then, the purpose of promoting mass participation in tertiary education is not limited to the purpose of the individual student per se. It is also promoted on the premise of a dream of shared prosperity that comes from the expected economic growth.

(Fitzsimons, 1997, p. 125)

In brief, economists have tended to measure only increases in earnings, rather than the contribution that highly educated people make as economic and social entrepreneurs, leaders and representatives of their countries on the world stage.

(World Bank, 2000, p. 3)

The quotations above illustrate the longstanding nature of the debate about the economic benefits of higher education. Cobban suggests that a student¹ and his family expected to benefit from his presence in the halls of learning while Peters and Roberts highlight the

expectations that education can solve the 'skills crisis' for an economy. A wider view of the benefits is promulgated by Fitzsimons and the World Bank. Fitzsimons suggests the dream of prosperity is shared by individuals and their society. The World Bank report notes that the contribution made by educated people is not only economic but as 'social entrepreneurs, leaders and representatives of their countries on the world stage' (World Bank, 2000, p. 3).

Chapter 5 reviews the calls of the last decade for more skills and critiques the presumed connections between an increase in skills and an increase in national prosperity. The chapter examines the 'public versus private good' debate about whether tertiary education is an investment which benefits the individual who acquires it or whether the economy and society, in which the individual studies, benefits. The chapter examines the arguments that the benefits of retraining accrue to individuals.

One of the theories through which this relationship is conceptualised is the theory of human capital. According to this theory one can measure 'investment' in people by way of their education and training in dollar terms, and one can also measure the rates of return on such an investment. This is a contested concept particularly between educationalists and economists. While common sense would suggest that the benefits of tertiary education and training accrue to both the individuals who undertake them and the society in which they live, the attempts to allocate and quantify the benefits are complicated and the conclusions subject to intense debate. The object of this chapter is not to support, nor to refute any particular position in the confused arguments in the upskilling debate. Nor is it the intention to conduct an empirical analysis, which is a task for economists, but to investigate the claims and the rhetoric.

The chapter considers the social returns from tertiary education. It concludes with the consequences for tertiary education and the costs and benefits for mature students.

Skills and the economy

Investigating the benefits to society of an increase in skills reveals, again both in New Zealand and internationally, many assertions and claims about the value of retraining to a nation state, including those already quoted (Creech, 1997; Haines, 1989; OECD, 1996, 1998, 2000).

In 1988, Haines connected technological change with new opportunities suggesting that upskilling and reskilling could be an answer to unemployment.

There has been rapid technological change, particularly the development and spread of information technology. ... Research on change to date indicates that, rather than the feared deskilling of jobs, the predominant effect of technological change has been to increase the demand for skilled labour across a wide spectrum of industries and occupations. ... The potential of the new technologies to enhance productivity depends on the quality of the labour force ... Human capital itself is the major resource contributing to productivity increases through continuous development and efficient utilisation of new technology. (Haines, 1988, p. 5)

A continuing theme is that of rapid change as a feature of the modern world. It is asserted that technology, the changing structure of the economy and the increasing complexity of modern society require people today to possess higher levels of skill and to be more adaptable. The United Kingdom is one among many nations which regards a highly qualified workforce as an economic asset. The theme of 'investing in people' has been a key concept.

The challenge we all face today is how to make the British economy stronger and more dynamic, in an environment where competition in the world is becoming ever tougher. One vital requirement is a world class workforce capable of beating the best. (Employment Department Group, 1993, p. 2)

All sectors face the challenge of rapid technological change, continual pressure for better quality or increasing competition nationally and internationally. Employers are beginning to recognise that in this tough environment, their competitive advantage will depend on having a highly qualified and responsive workforce. (Employment Department Group, 1993, p. 6)

Similarly in New Zealand, more recently, the major concern expressed by politicians and business leaders has been, not so much that unemployment might result from a lack of skills, as about the level of skills needed to compete internationally.

We live in a world where the pace of change will continue to accelerate. As a country we must keep up with, or if possible, ahead of others in the skills and development of our people. (Ministry of Education, 1997, p. 3)

Among the key goals adopted by the Labour Government which came into office in 1999 was that of improving New Zealanders' skills. Minister of Social Services and Employment, Steve Maharey, declared:

The challenges New Zealand faces in the labour market are made more complex by the fact that our economy, like those of other developed nations, has changed considerably in the past twenty years and will almost certainly change in the future at an even faster rate. This means that the sort of jobs that will exist in the future will be very different from those that people work in currently. Most will require a high level of skill and will be heavily reliant on new technology of various types. Instead of the 'mass production' type of employment that predominated in the post-

war years, tomorrow's jobs are more likely to be in niche markets. (Department of Labour, 2000, p.3)

It is possible to overstate the change in the type of employment New Zealanders will undertake. New Zealand was never a highly industrialised society. Throughout the twentieth century the largest proportion of New Zealand's full-time workforce service has been employed in the tertiary sector. More people are involved in the production of services than the production of goods (Hill, Couchman and Gidlow, 1994, p. 302). It is also frequently asserted that the future of a country in the global economy depends less than in the past on its physical resources, and more on the technological innovation and capacity of its workers. I have argued that technological innovation has been the key to New Zealand's wealth creation since the mid-nineteenth century. Innovation and skills are not new as contributors to New Zealand's economic condition.

Similarly much of the discussion about deskilling and the need for new skills has not been predicated on a specific understanding of what is required in New Zealand. We tend to look overseas to economies that appear to be successful and expanding, and decide that what they define as skills, are what we, too, require for economic progress, ignoring the particular nature of the New Zealand economy. For example in 1988, the New Zealand Planning Council argued, on the basis of a United States analysis that New Zealand services sector between 1990 and 1995 was expected to provide 80.9 percent of net new jobs, service sector occupations demanded greater average levels of skills than those for the average of other occupations and thus the "continued growth of the services sector in New Zealand is likely to create increased demand for a more highly educated and skilled labour force" (Haines, 1988, p. 25).

Given that there are parts of the service sector, such as tourism, in which skill levels are not high, it should not be assumed that a move to the service sector, would necessarily create a need for upskilling. "Jobless growth" occurs as employment shifts from the primary and secondary areas of the economy, from agriculture and manufacturing, to the tertiary sector, including service industries. Policy advisers link this shift to a need for rising skill levels, failing to give adequate consideration to whether a real rise in skill is required (Higgins, 1993, p. 35).

For a nation on the periphery like New Zealand the real benefits of initial and further education may lie in having an educated nation of adaptable people who continue to learn.

Human capital theory

Attempts to quantify the value to the individuals of their education or retraining are often based on the theory of human capital. This theory assumes that investment in education leads to rewards for the person undertaking the activity. The concept of human capital (Becker, 1962) is based on Adam Smith's remarks that one of the elements of the 'fixed capital' of the nation was

the acquired and useful abilities of all the inhabitants or members of the society acquired during education, study or apprenticeship and becoming a capital fixed and realised, as it were, in the person. (Smith, 1979, p. 377)

Human capital theory has increasingly been linked to the concept of the 'knowledge economy', because of the belief that, in the future, skilled and educated people, rather than capital or labour, will be the source of wealth and economic growth. It is usually accompanied by an unstated assumption which equates increased skill with increased education.

Knowledge economies are those which are directly based on the production, distribution and use of knowledge and information. This is reflected in the trend towards growth in high-technology industries, more highly-skilled labour and associated productivity gains. Knowledge embodied in people (as 'human capital') and in technology, has always been central to economic development. But it is only over the last few years that its relative importance has been recognised, just as that importance is growing. (MoRST, 1998, p. 8)

The World Bank, in its report on tertiary education in developing countries, notes the emergence of the concept of 'human capital', the knowledge people can use, as critical for national development.

Although the concept of human capital dates to Adam Smith's *Inquiry into the Nature and Causes of the Wealth of Nations* (1776), it is only within the last 50 years that labor economists have seriously examined the returns to the investment in education. By the mid-1970s techniques focused on the difference between average annual earnings among people with different levels of educational attainment (for example, secondary versus primary school graduates). They also analyzed differences between social and private rates of return, by comparing the amount of public subsidy received by education with the amount of extra tax society was able to levy on resultant higher earnings. (World Bank, 2000, p. 39)

The modern form of human capital theory which associates education and rates of return² was applied to education in the 1950s and 1960s and, according to Marginson, associated with the expansion of education 'orchestrated by the Organisation for Economic Co-operation and Development (OECD) and other agencies' (1995, p. 5). The World Bank

reports on analyses of rates of return undertaken globally. The 2000 Report concluded that the difference was greater in primary education than in higher education,

and therefore that government action was more justified in the former than in the latter. But the standard rate of return analyses stopped there, consistently failing to reflect that the benefits of higher education extend well beyond the incremental earnings accruing to those individuals who receive it. (World Bank, 2000, p. 40)

Much of the debate on 'investment in education and training' centres on the concept of private good, the idea that the individual who receives the education is the one who benefits economically and therefore should be responsible for the cost of acquiring the education (Department of Education, 1998, p. 19). That the costs are not only monetary and that the individual 'invests' not only through the payment of tuition fees and income foregone, but also in time and effort, is not normally considered.

Fitzsimons, in writing about New Zealand tertiary education, cautions that human capital theory is 'an impoverished notion of capital' declaring that

it is unable to understand human activity other than as the exchange of commodities and the notion of capital employed is purely a quantitative one. (Fitzsimons, 1997, p. 113)

Marginson argues that New Zealand's efforts to increase participation in tertiary education are illustrative of the worldwide application of human capital theory to education. He attributes this spread to the influence of the OECD and its focus on the strong relationship of the growth of the economy and human capital. Rates of return are calculated for different individuals, according to their 'investment' in education and the financial benefits that accrue from their increased earnings. Both rates are both calculated solely in dollar terms.

The OECD report, *Education at a Glance 2000*,

points to the benefits of tertiary education for workers. People with higher educational qualifications are more likely to be in the workforce, and this is particularly true for women.

And a university education adds most to individuals' earnings, with university graduates typically earning between 20 and 100 percent more than upper secondary graduates by mid career. In New Zealand, women with university degrees earn about 50 percent more than those with only secondary school leaving qualifications. (Rivers, 2000, p. 6)

Fitzsimons is one of a number of New Zealand educationalists including Codd, Peters, Roberts and Marshall, who, like Marginson in Australia, query the association of human capital theory with education and the kind of analysis undertaken by the OECD, and by

Maani in the significantly titled *Investing in Minds: the Economics of Higher Education in New Zealand* (1997). Maani analyses the questions of “the public and private returns to investing in higher education and the link between education and income distribution in New Zealand” (1997, p. 1). The relevance of Maani’s research to the discussion lies in its being primarily concerned with evidence relating to public and private investment and access to higher education in the New Zealand context. Maani contends that

major changes in the structure of the economy in the last decade have prompted the need for new skills, resulting in significant increases in participation in higher education since the 1980s. (Maani, 1997, p. 1)

The reasoning that the increases in tertiary education participation relate to the need for new skills is questionable. As will be discussed, the demand for qualifications as entry criteria for a career may be a result of credentialism rather than of the need for skills in themselves. Rates of (un)employment have a significant effect on the uptake of tertiary education as do the actual, and opportunity, costs.

It should be noted that the questions surrounding public and private investments in education encompass a wide range of issues including both positive and normative aspects. For example, the question of private investment of education addresses generally positive issues relating to intertemporal utility maximisation, requiring an efficient allocation of one’s personal resources, including time and funds spent on education, such as fees. In this framework, the expected lifetime returns to education, relative to costs, are expected to guide participation decision, and are, therefore, of interest. The social efficiency of investing in education, in turn, requires that society’s educational investments, including public and private expenditures, result in economic returns that are positive and productive compared to society’s alternative investments. In this framework social rates of return are of interest. (Maani, 1997, p. 2)

We might hope on the basis of that outline that Maani’s analysis would clarify the question of the contribution made to the economy by investing in education but that is not the case.³

The question of the public funding of education is, in turn, influenced by social efficiency considerations, but also by normative considerations of social equity, such as the value placed on the equity of access to education, or the link between payments for education and benefits received from it. As a result, economic analysis does not provide unique solutions for the public funding question, and social priorities are also prominent on that decision at an international level. (Maani, 1997, p. 2)

Statistical evidence is presented of the links between educational investments and income levels in New Zealand. On the basis of these calculations Maani finds that for the

individual “the rewards to post-compulsory investment in education are positive and significant” (Maani, 1997, p. 79). Maani uses data from the mid-career incomes of those who received their tertiary education at an earlier time when many fewer people gained such an education. Maani fails to take into account that, since the group was an élite, it is not surprising that their incomes were higher than those who were not graduates. Now that a much larger section of the school leaving population is gaining tertiary qualifications, it will be interesting to see if the same higher mid-career earnings eventuate for those who are graduates, but not members of an élite in the way their predecessors were.

Furthermore it would be a reasonable assumption that, if we add foregone earnings and student loans to the equation, the tertiary qualified mid-career graduate will be closer in income level to his or her uncredentialed counterpart. The payments that such graduates are required to make to pay off their loans affect their disposable income. Though the credential may have helped the graduate gain employment it may well be not the credential, but the comparative advantage, that leads to higher earnings.

Those who question the assumptions behind Maani’s calculations also see the matter differently.

The role of government, in this vision, is simply that of creating the conditions for the efficient operation of the market, and transferring whatever can be transferred from public service to private enterprise so that the discipline of the market can produce profits efficiently, rather than ‘indulge’ those who benefit most from public service. (Bates, 1990, p. 42)

Skills and prosperity

The equation of increased skills and increased prosperity may be over simplified for the nation as well as for the individual. This suggestion is reinforced by an analysis of the response of the New Zealand government to ‘the skills crisis’ of the 1980s (Higgins, 1993). Upgrading the skills of the labour force was considered necessary because, it was argued, the technological transformation of work meant that skill demands in the labour market were increasingly for higher, rather than lower, level skills. The previously quoted comments by former Labour party leader, Mike Moore, which asserted that the end of the blue collar worker was in sight, that soon all blue collar workers would have disappeared as all jobs became white collar ones, were echoed by the ACCESS publicity which argued that:

Within New Zealand we must recognise that low skill jobs ... are simply not as plentiful as they once were ... Just under 73 % of unemployed people are looking for less skilled work, but only 44 % of the vacancies are for the less skilled. (Department of Labour, 1985, p. 6)

Such concerns were expressed over and over again during this period, linked with the need to improve education and training. Because there were fewer unskilled jobs, and more jobs which demanded higher levels of skill, there was deemed to be an increased need for skills acquisition and enhancement.

While the numbers of people participating in formal education and training have grown considerably in the last two decades New Zealand's efforts in this field still fall well short of our competitors. Yet the intensity of that competition continues to grow while the technology explosion demands higher levels of skill in industry and commerce than ever before. In addition to all this, the number of jobs with low levels of skill are not nearly as plentiful as they once were. (Department of Labour, 1987, p. 5)

The government response was to set up training programmes for the unemployed in an attempt to improve the skill level of workers seeking jobs. A single scheme (the Training Assistance Programme) was to replace all existing training and work programmes with the aim of increasing productivity. There were, however, problems.

The need for this approach is underlined by a curious anomaly: while unemployment still remains high by longer term historical standards, employers are currently reporting difficulty in filling many positions through a lack of appropriate skills in job seekers. (Department of Education, 1985, p. 5)

Examining the statement reveals the underlying assumptions on which the policy was based.

Such a view was based on some objective appraisal of 'skill'. Yet this term was rarely used to signal any specific factors lacking in unemployed people. It was, in fact, used as a political signal that here was something lacking in unemployed people, rather than as a description of some technical competency. (Gordon, 1990, pp. 185-6)

Higgins considers this approach to skill description 'technological determinism'.

These assumptions about the introduction of new technology into the workplace and the changing content and structure of employment consequent on this, led New Zealand policy makers in the 1980s to believe that unskilled jobs within the labour market were fast disappearing, while the skilled components of many other jobs were expanding. As well, new employment opportunities were believed to be opening up for individuals with high level skills ... The workforce in general required "upskilling" in order to meet the employment requirements of the future. (Higgins, 1993, p. 36)

New Zealand was not alone in this belief. As Higgins notes, similar assertions emanated from the United Kingdom, from Australia and from the United States, all of them lacking an empirical base. The belief in the need for upskilling was, and is widespread and affects the workers in the workplace because policy makers base their actions on these premises.

But while in the 1980s the government thought that providing training programmes would help the unemployed find jobs, this seems not to have happened, though the programmes did reduce the statistics of the unemployed by converting them to educational statistics (Gordon, 1990, p. 183). The reason for this may be found in the challenges to the argument that there was a crisis in the labour market with a mismatch of skills caused by low levels of education in New Zealand. Higgins argues that the government in calling for upskilling of the unemployed was seeking a supply side solution to a problem of demand (1993, p. 22). From this point of view the introduction of the ACCESS training programme was a mistake as it aimed to train workers for jobs which either did not exist or were at least in short supply.⁴

In the 1990s, Snook, as Higgins had about the earlier period, refuted the claims made over the previous decade that there was a skills crisis and denounced “the myth of the skills crisis” (Snook, 1994, p. 1) as the creation of politicians, business leaders, educators and union officials. Snook’s main rebuttal was directed at Treasury, which had advised the authors of the report, *OECD Economic Surveys, New Zealand, 1993*. He contended that the attempts to show that there was a skills crisis resulting from New Zealand school leavers being under-skilled was not supported by the evidence, pointing out problems with comparative figures, the lack of correlation and the absence of a causal relationship between participation rates and skills acquisition.

Snook pointed out that the report, in trying to find evidence for ‘a skills mismatch’, admitted that, in New Zealand,

the availability of skilled labour appears to be high by international comparison ... and - one year after the beginning of the economic recovery - the balance of employers still find that getting skilled labour is becoming easier. They [the authors of the OECD report] produce some data which they admit is inconclusive and finally admit that ‘an index of occupational mismatch for NZ based on both unemployment and vacancy data displays no clear trend over the 1980s’ and ‘there is evidence that in the last two years unemployment has risen more rapidly among those with higher qualifications than the unqualified. (Snook, 1994, p. 3)

Snook further contended that

the unemployment of recent years is the result of vanishing jobs, not decreasing levels of skills. The solution to unemployment lies in government policy not individual qualifications. (Snook, 1994, p. 3)

Snook is suggesting that solutions to unemployment or 'skills deficits' must be founded on social analysis of the local scene and on government action. Higgins in her detailed research demonstrates the need for policy based on research rather on rhetoric.

In the 1990s the New Zealand government, taking its cue from overseas examples, again believed that the provision of education and training would lead to a better skilled workforce and a more globally competitive economy. But this time the government did not provide the programmes for upskilling the New Zealand workforce. Instead, having decided post-compulsory education was a private good, it left individuals to find and partly fund their own education.

Social returns

Education provides returns beyond those to individuals and beyond the purely economic. The World Bank, for example, cautions against a purely pragmatic and market-oriented approach to education and educated people, citing the many benefits in addition to economic ones that a society gains from its educated citizens.

Rate of return studies treat educated people as valuable only through their higher earnings and the greater tax revenues extracted by society. But educated people clearly have many other effects on society: educated people are well positioned to be economic and social entrepreneurs, having a far-reaching impact on the economic and social well-being of their communities. They are also vital to creating an environment in which economic development is possible. Good governance, strong institution, and a developed infrastructure are all needed if business is to thrive - and none of these is possible without highly educated people. Finally, rate-of-return analysis entirely misses the impact of university-based research on the economy - a far-reaching social benefit that is at the heart of any argument for developing strong higher education systems. (World Bank, 2000, p. 39)

In this report at least, the World Bank thus takes a wider approach than some other international agencies in assessing the public and private good of education. It declares that

for centuries people have gained a substantial benefit from the higher education they have received - and wider society has benefited too. ... Higher education simultaneously improves individual lives and enriches wider society, indicating a substantial overlap between private and public interests in higher education. Higher education raises wages and productivity, which makes both individuals and

countries richer. It allows people to enjoy an enhanced “life of the mind”, offering wider society both cultural and political benefits. And it can encourage independence and initiative, both valuable commodities in the knowledge society. (World Bank, 2000, p. 37)

At the same time the World Bank promotes the idea that economies grow more strongly with the contribution made by educated people.

The macroeconomic impact of education is strong: just as individuals with better education tend to achieve greater success in the labor market, so economies with higher enrollment rates and years of schooling appear to be more dynamic, competitive in global markets, and successful in terms of higher income per capita. The point is dramatically illustrated by the experience of East Asia. From 1991 to 1995, East Asia experienced faster growth per year than did Latin America. Economists calculate that the higher education levels of the East Asian workforce account for a full half-point of that difference. (World Bank, 2000, p. 38)

That the skills and education of a workforce make a significant contribution to a nation’s GNP are incontrovertible. Difficulties arise however where the benefits to an economy are disaggregated to an individual with the idea that the benefits therefore, such as those from tertiary education, should be paid for by that person. The question of ‘externalities’, the social benefits not appropriated by an individual, are hard to calculate and not always recognised. Unfortunately as Marginson points out (1993, p. 40), it has not proved possible to calculate the value of the externalities.

An indication of New Zealand’s pragmatic approach to the split between individual and public good is to be found in the Hawke Report (Department of Education, 1988) and the policies which followed from it. The report determined that there was no principled way to assess the relative public and private benefits to be had from tertiary education. It therefore opted for a twenty five to seventy five ratio with the individual’s gain (and thus contribution) being set at twenty five percent. This was close enough to the then current split in the cost of tertiary education to make it attractive to the Government, and so it gradually lowered what it came to call its ‘subsidy’ of tertiary tuition from levels which were above seventy five percent, the term ‘subsidy’ implying that there were no externalities at all. However since no government actually formally adopted the seventy five per cent mark, successive governments have felt free to move their subsidy lower than seventy five per cent.

Furthermore, neither the Hawke Report nor the Government Green paper (Ministry of Education, 1997) acknowledged that tuition costs are only part of the cost individuals pay

for participating in tertiary education. Foregone earnings and other opportunity costs played no part in their calculation; nor did the interest on student loans.

It seems then that human capital theory as it applies to the cost-benefit analysis of tertiary education and training awaits a clear analysis. For such reasons Marginson also cautions against the application of human capital theory and against basing policy on

the conception of education as a site of *investment in human capital*, as investment in the future earnings of the individuals in whom that (allegedly) value adding investment is made. Human capital theory assumes that education develops cognitive attributes in individuals, these attributes are carried by individuals into the workplace, and in the workplace the human capital augments skill and productivity, and thereby creates additional wealth. The economic value of both the additional skill, and the additional wealth it generates, are measured by the additional earnings received by educated labour. This conception of education as investment in human capital takes in the notion of individual investment in education; and also social investment in education, to the level of the population. Human capital theory calculates the returns on both individual investment in education and social investment in education, and has mapped the statistical relation between investment in education, and economic growth. Data on individual rates of return may be used to guide the course choices of individual students and whether it is profitable for them to pay tuition fees or take out loans. (Marginson, 1995, p. 6; italics in the original)

In support of Marginson, one might mention the high costs of university courses in the visual arts and the generally poor rates of return for work in the visual arts, in comparison with the generally low costs of courses in commerce and the currently often high rates of return to commerce graduates.

Marginson further asserts, referring us back to credentialism, that

while there is an observable correlation between education and pay, the association is not universal, and the question of causality is another matter. Screening theory puts forward an alternative explanation, hostile to that of human capital theory: that educated labour receives additional returns not because educated labour is more productive but because employers treat educational credentials as a screening device that signifies higher productivity on the job. From within human capital theory, screening theory has never been convincingly refuted (Blaug, 1976). (Marginson, 1995, p. 7)

If Marginson is right about this, the growth in credentialism is not caused by the fact that occupations now require a more highly skilled workforce but rather that, in consequence of historically high rates of unemployment and consequently high numbers of job applicants, employers faced with large numbers of applications use the credentials of applicants to sort their shortlists.

Scott supports screening theory with his view of the use of qualifications as a sieve.

Graduates are increasingly taking non-graduate jobs, partly because employers are using graduate status as a sieve in a competitive labour market and partly because these jobs have become more technically and conceptually sophisticated (and, generally, because of a combination of these two factors). As a result the demarcation between graduate and non-graduate status has been eroded in terms of occupation. (Scott, 1995, p. 111)

Consequences for tertiary education

The demand for upskilling has had consequences for tertiary education. As Peters and Roberts point out, the connections with, and implications for the economy are driving the changes in that sector.

Fundamental to understanding the new global economy has been the rediscovery of the economic importance of education (Papadopoulos, 1994: 170). The OECD and the World Bank have stressed the significance of education and training for the development of 'human resources', for upskilling and increasing the competencies of workers, and for the production of research and scientific knowledge as keys to participation in the global economy. Both Peter Drucker (1993) and Michael Porter (1990) emphasise the importance of knowledge - its economics and productivity - as the basis for national competition within the international marketplace. Lester Thurow (1996: 68) suggests that 'a technological shift to an era dominated by man-made brainpower industries' is one of five economic tectonic plates which constitute a new game with new rules: "Today knowledge and skills stand alone as the only source of competitive advantage. They have become the key ingredient in the late twentieth century's location of economic activity." (Peters & Roberts, 1999, p. 58)

Peters and Roberts continue their critique by asserting that the claims of a skills crisis drive the calls for educational institutions to be providers of training for the market place.

Public educational institutions have allegedly suffered from 'provider capture' in the past and now need to be forced to adjust their priorities to fall more in line with changes in the global marketplace. (1999, p. 17)

The effect on educational providers also manifests itself in the increased number of different kinds of education they offer and the increased need for qualifications as credentials for workforce participation. For example, there has been a significant growth in the number of post-graduate courses and students.⁵

The pressure exerted by government on tertiary educational institutions is not without its critics. The hegemonic discourse of economists referred to earlier is evident in the Ministry of Education's statement on the need for upskilling. This discourse can be imprecise so that one meaning is implied and the reality hidden. In the following

statement a significant proportion of the 'investment' is made by the student but the implication is that the government is the investor.

The emphasis on improving the national capital stock through participation in tertiary education is further reinforced by the statement that: ... 'investment in the upskilling of New Zealand's adult population will become of greater importance as older age groups increase in size, and as the rate of growth of participation in tertiary education and training by school leavers slows.' (Ministry of Education, 1994, p. 28)

The Ministry's statement acknowledges the importance of those who return to study but there are contradictions in the expectations of "improving the national stock" and requiring the students themselves to pay for this improvement.

The costs and benefits of upskilling .

Human capital theory shows that there are greater rates of return for primary and secondary education than for tertiary education⁶ leading Marginson to ask, 'Why then does educational participation keep expanding, with an ever increasing number of people in post graduate courses?' (Marginson, 1995, p. 7).

While the estimates of lifetime earnings are not in themselves significant for this discussion it is worthwhile to note that, as would be expected, individuals 'studying at advanced ages' will face lower rates of return (Maani, 1997, p. 83). Given the costs associated with retraining, this raises the question, which will recur in Chapter 11 when the focus is on the individuals who are retraining, as to whether economic motivation is the sole or even the primary motivation for all who undertake retraining.

As Maani notes:

An important implication of these results is that investments in post-compulsory education are associated with significant lifetime income differences, such that investing in education is a profitable *engagement for a young person*. (Maani, 1997, p. 90; emphasis added)

On the basis of human capital theory Marginson's question rephrased as 'Why then does educational participation keep expanding, with an ever increasing number of *older* people in post graduate courses?' is even harder to answer. Acting on the implication that Maani draws, older individuals would be unlikely, or perhaps unwise, to undertake education for occupational change solely on the basis of its possible monetary rewards. The costs are clear; the personal economic benefits less so.

The OECD report points out that, as in New Zealand, students in other countries

are alert to changing opportunities in the labour market. That significantly large numbers of them are of mature age and combining study with work makes them especially sensitive to the relevance of their studies in economic terms and of the costs they are incurring in study. (OECD, 2000, p. 56)

I have suggested that the economic benefits which accrue to both the state and the individual may have been overestimated. I have also suggested that credentialism may be a better explanation for people needing further education than their necessity to obtain skills and knowledge. However, notwithstanding these two mitigating circumstances, and the failure of human capital theory to account for the proportions of public to private benefit that accrue from higher education, there appears to be a consensus that there is a significant public benefit.

If there are societal benefits as well as benefits to the individual, then it follows that the cost of tertiary education should be shared, as the benefits are, and that, given the calls for people to upskill and reskill for the nation's benefit, this should apply to those retraining as well as to school-leavers. Those seeking education for occupational change are invisible in government policy, despite, not only their existence, but also their importance for the economy. Further, as I have suggested, policy ignores the efficiency gains that education for occupational change brings.

Conclusion

At the same time as more adults began to seek retraining, the discourse which was becoming dominant in New Zealand declared that this was their choice and their responsibility. As people sought upskilling and reskilling in order to enhance their own prospects, to contribute to their own futures and that of New Zealand, the argument that this was a matter for the individual alone was gaining credence. Like younger students, mature students found themselves seeking both education and credentials and shouldering the costs. At the same time the state was encouraging them to take this step because of the shared belief that this was the way to economic prosperity for the nation. While the rhetoric is widespread, much of it is simplistic. In relation to the interplay between the New Zealand economy, the New Zealand labour market and the skills of employees and job seekers, many of the claims are hegemonic and lack sustained analysis.

Education is multi-faceted in its benefits. Belief in the acquisition of skills as a simple route to national prosperity may be overstated. Belief in the private benefits of education

may result in ignoring the importance of the wider values of education. The benefits of education may include, but are not confined to, the “dream of a promise of shared prosperity” (Fitzsimons, 1997, p. 125). This dream of a brighter future from education, training and retraining had become a potent one for individuals, educational institutions, and the state in New Zealand. The dream was shared by mature students as well as school-leavers.

The next two chapters investigate the development of New Zealand education in order to identify whether there are features which have encouraged retraining, especially education for occupational change. Chapter 6 identifies the features of New Zealand education which have facilitated upskilling and reskilling before we return, in Chapter 7, to the impact of more recent policy on state provision.

Notes

¹ In the middle ages the student would have been male.

² The World Bank Report (2000) outlines the basics of Rate-of-Return analysis in this way:

Estimating the 'rate for return' on investments in different levels of education allows public policy makers to judge the effectiveness of education policies that target different parts of the education system. One conventional approach involves comparing the average earnings of individuals at various stages of educational achievement.... After adjusting for direct costs associated with the corresponding levels of educational achievement (for example, tuition and fees), and taking into account of the fact that the value of a given sum of money will vary according to the time at which it is spent or received, the (discounted net) earnings differentials can be expressed in classic 'rates of return' terms.

Rates of return are considered private if they are based on the differences in take home pay and the costs of schooling that come out of the pockets of students and their families...

Once both private and social rates of return are calculated, it is easy to calculate the difference in these rates – i. e., how much society benefits above and beyond the private return. It is this difference that provides an economic justification for government action. If the social return exceeds the private return, this tells us that the unfettered operation of the private markets (so-called 'laissez-faire') will not provide as much education as is desirable from the point of view of society. (World Bank, 2000, p. 40)

³ This is akin to expecting that a person contemplating giving up smoking would calculate their increased lifetime earnings based on an increased life expectancy rather than calculating the cost of the next packet of cigarettes.

⁴ Codd (1990b, p. 198) argues that "during conditions of high youth unemployment, the state intervenes with work skill training programmes (for example ACCESS), not to provide the necessary labour power for certain industries, but to enhance the opportunities for the exchange value of labour."

⁵ Rivers noted in 1994 that in the previous decade there had been 70 percent growth in doctoral and post doctoral numbers, 170 percent in Honours Bachelors degrees 230 percent growth in Masters and even greater increases in post graduate diplomas and certificates. This growth has continued.

⁶ These rates of return are also noted by the World Bank (2000).

Chapter Six

Tertiary education in New Zealand

No country has done more than New Zealand to assist its youth to advance their education. By a free system of secondary education and by a very liberal scheme of scholarships and bursaries the State is aiming to ensure that no child of ability, whatever the economic status of his parents, is without the opportunity of developing his talents.

Sir Thomas Hunter (1940, p. 26)

New Zealand is not the open mobile society the common myth of everyone getting a "fair go" suggests ... However, there is enough mobility to provide a material basis for the perpetuation of the equality myth.

Lauder & Hughes (1990a, p. 55)

The history and nature of post-compulsory education have given a special character to upskilling and reskilling in New Zealand. Fewer opportunities to retrain in the workplace occur in New Zealand than in those countries where many employers have large workforces and provide retraining programmes. Therefore, because in New Zealand upskilling occurs more often in educational institutions than workplaces, tertiary education is a major player in upskilling and reskilling.

The special character of tertiary education in New Zealand is found in its provisions for open adult entry, general degrees and opportunities for part-time study. The scope and focus of Chapter 6 is therefore on the history of tertiary education in New Zealand, particularly that of the universities and polytechnics as the two major providers of retraining, and that of adult education, the informal branch of post school education, up until 1984. The objective is to trace the particular features of the educational system which affect retraining.

A significant theme, which helps explain why women have been pioneers in the area of retraining, is prefigured in this chapter. While entry to education in this country has been theoretically more open than in most other countries, in practice girls' access to education, and women's participation in education and training, have been hindered by attitudinal, socio-economic and political barriers.

The chapter also provides a context for the later comparisons with the tertiary education systems of the Netherlands and the United Kingdom, comparisons which demonstrate that the nature of tertiary education provision profoundly affects the uptake of reskilling. This account will thus provide a context for the later discussion of the changing nature of the tertiary sector over the last two decades and the relevance and extent of the changes in the period post 1984 which have affected access and participation.

Equality in New Zealand education

In the first chapter I referred to the changes in people's lives as including the fact that the period spent in education gradually lengthened as the provision of universal primary education stretched into the provision of secondary education and then increasingly into participation in tertiary education.

The Education Act of 1877 made schooling compulsory for children between the ages of seven and fourteen years. This primary education was to be 'universal, compulsory and secular' (Beeby, 1986, p. x) and accessible to all children regardless of class, race or creed, setting the pattern for universalistic provision in education and treating girls with an equality which was not often accorded to them as women. The statement of the Minister of Education, C.C. Bowen, in introducing the bill, indicated the limits to this universality of provision and a somewhat utilitarian view of education. While he hoped to place the key of knowledge in the hands of every boy and girl, when it was proposed that this should include secondary as well as primary education, he and others opposed it on the grounds that education should not be wasted on the undeserving (Renwick, 1986, p. 26). It was not intended

to encourage children whose vocation is that of honest labour to waste in the higher schools time which might be better devoted to learning a trade, when they have not got the special talent by which higher education might be made immediately useful. (New Zealand Parliamentary Debates, 1877, Vol. XXIV, p. 39)

An implicit distinction is made between education and training: the skills for working in a trade would be acquired on the job.

This statement would appear to be gender neutral; in many ways New Zealand as a pioneer society was less hindered by old patterns and the strictures of tradition than longer established societies and the effects of this were seen in the provision of education for girls, as in other areas. Other nations made progress more slowly, being affected by the class system (as in England) or under less impetus to change existing structures. In New Zealand primary education for girls came sixteen years before women were granted the franchise and then, when in 1893 New Zealand women won the vote, they did so before the women of any other country. Maori were included in the provision, although the additional measures to enable them to take full advantage of educational opportunities are still required and being implemented more than a century later.

The Secondary Schools Act of 1903, caused a sudden boom in numbers by providing free places at high school for two years for all pupils who passed their proficiency examinations at the end of primary school. The problem for girls and women hidden behind this statement was not legislative but attitudinal. Their place in employment, as their role domestically, was that of support. Priority in a family was given to boys because their education was linked to their role as future breadwinners. Girls' schools responded by adding a 'decidedly modern curriculum', with a focus on domestic arts, to their strong academic tradition (Page, 1992, p. 117). Later their principals supplemented this focus with a commercial one, as the demand for female office workers grew.

There is a considerable irony in the enthusiasm with which this generation of pioneer women graduates, many of them quite outstanding academically, supervised the introduction of a sex-differentiated education that tended to lock women into subordinate jobs. (Page, 1992, p. 117)

There are no relevant statistics on girls' progress and achievement at school at this time (McGeorge, 1987, p. 101), only the observation that, in 1912, there were only 91 girls enrolled in public primary schools for every 100 boys when, on the basis of the 1911 census, 97 would have been expected (Hogben, AJHR, 1912, E-1, p. 8). Girls were always in a majority of those exempted from school, so legislated equality was only a partial solution to the problem of sex-based discrimination. The principle of universality was extended in 1914 to secondary schooling for those who had passed the Proficiency Examination at the end of primary school, with the examination requirement being removed in 1937 (Parton, 1979).

The most famous statement in New Zealand education establishes and confirms this philosophy of legislated equality. Despite the use of the male pronouns (later regretted by Beeby), the view of education as a right for all, is echoed and extended in the statement articulated in 1939 by C. E. Beeby, then Director of Education, and adopted and voiced by Peter Fraser, the Minister of Education:

The Government's objective, broadly expressed, is that every person, whatever his level of academic ability, whether he be rich or poor, whether he live in town or country, has a right, as a citizen, to a free education of the kind for which he is best fitted, and to the fullest extent of his powers. So far is this from being a mere pious platitude that the full acceptance of the principle will involve the reorientation of the education system. (AJHR, 1939, pp. 2-3)

While Beeby, though far-sighted, is unlikely to have envisaged the effect of this philosophical stance on the upskillers and reskillers of the twenty-first century, connections between this statement and the measures which help New Zealanders to undertake upskilling and reskilling at an unusually high rate can and will be traced. The philosophy of education as a right was established.

The importance of education was further enhanced by a belief in its ability to facilitate social change. Beeby, in his introduction to Renwick's essays on New Zealand education, writes of wanting to help create:

an education system that could serve the more equitable kind of democracy we hoped, rather vaguely, to see emerge.

We were encouraged in this attitude by an exaggerated idea of the effect an improved form of education could have on social change. Our over-riding interest in educational equality for the individual would, we thought, itself contribute, through the next generation, to the growth of a more equitable society... Renwick does not distort the picture too much when he writes that, for us, "Education thus came into its own as an instrument of both social betterment and economic and social progress".¹ (Beeby, 1986, p. xxxii)

This credo appears in later documents such as the Thomas Report of 1944 which recommended the abolition of the Matriculation examination and the introduction of a new University Entrance examination and that, "as far as possible, all post primary pupils, irrespective of their varying abilities, and their varying occupational ambitions, receive a generous and well-balanced education" (Department of Education, 1944, p.4). The concept of equality was echoed again by the 1962 Currie Commission which concluded that, "In New Zealand egalitarian feelings still exert much of their former power towards uniformity, the avoidance of special privilege, and the equality of status and opportunity" and, as the

Commission observed, the statement provided “an objective for education at all levels, not merely the post-primary” (Department of Education, 1962, p. 218).

This fundamental principle of equality played out in differing, often pragmatic ways as the parts of the education system developed. ‘Equality’ early on tended to mean that education, while free, was available to those who were in a financial position to take advantage of it. Examinations such as Proficiency and Matriculation were barriers to those not equipped to cope with an academic course and, while in theory social class and wealth played little part in deciding who gained further education, in actual practice education was more often a choice taken up by those who were academically able and/or well off.

The Learning Society?

The tensions between education for vocational reasons and for personal development and citizenship moved in a liberal direction after World War II. Education came to be regarded as an instrument of social policy (Renwick, 1986, p. 104) and

There was a widespread belief in the saving grace of science and technology... It was the heyday of the technical expert. Science and technology were the engines of progress. The limiting factor was not the assured availability of money and natural resources but of human capital. Education thus came into its own both as an instrument of personal betterment and of economic and social progress. (Renwick, 1986, p. 106)

This optimism was tempered in the 1970s as unemployment created a climate of uncertainty so that vocationally oriented schooling became more problematic. While marketable skills were what employers claimed they wanted, flexibility and adaptability and the willingness to learn were the skills and dispositions needed in times of change.

Renwick noted that the more society moves away from traditional ways of doing things and is subjected to technological, social and moral change, the more it requires the education system to teach formally what was previously acquired informally. His predictions are worth quoting at length because they provide a framework against which to consider the way in which ‘lifelong learning’ has become equated with vocational upskilling and reskilling. Renwick foresaw,

the growing demand for education, training, retraining and refreshment by people in the course of their lives as adults. These changes reflect the underlying demographic trends. In New Zealand for example, the number of people 0-19 is forecast to decline from 39 percent to 30 percent of the population by the end of the century, with a corresponding increase in the number of people over the age of nineteen. The new demand will be for

education, training, retraining and refreshing at the post-secondary level of the system. It will be fuelled from several sources: technological; vocational, as a result of changes in the specification of jobs: personal, as a result of changing demands, needs and interests; and social and civic, as a result of changes in society that will make for new requirements in the way individual citizens respond to their circumstances. This is the growing reality that gives meaning to the idea of lifelong education. Much of the learning that will fall under this heading will be of the kind that will call for short, periodic commitments to the learning of some thing new - short courses, weekend schools, evening classes, and self-instructional courses of various kinds. Proportionately more adults, under more aspects of their experience, at more points in their life will need to add to what they know and can do, and will need to revise their attitudes. This last point is important. The prediction of a growing demand for post-secondary education does not rest only on grounds of technological change. It rests no less on social, cultural and moral change. (Renwick, 1986, p. 116)

By the time we reach Chapter 11 it will be clear what an insightful and far-sighted prophecy this was.

University education

University education played a significant role in New Zealand educational history from the outset. Clarence Beeby, who was significant for his influence on New Zealand education as well as being one of its most astute commentators, reflected that while “the University is an autonomous body, responsible for its own destinies and author of its own policies” it might take a different form in this country (1992, p.222). This section traces the ways in which university education in New Zealand developed local characteristics which now facilitate education for occupational change.

The first university, that of Otago founded in Dunedin in 1869, shortly after became the first college of the University of New Zealand, joined by Canterbury University College in Christchurch in 1872, Auckland University College in 1883 and Victoria University College in Wellington in 1899. This first period was one of conflict. Differences over the role of the university were both local and also a reflection of the conflict in England. There was dissension over whether a university should be an examining or a teaching body, whether it should be essentially a researching or teaching body, and whether it should include science as well as classics, mathematics and philosophy (Beaglehole, 1937; Parton, 1979).

The 1870 and 1874 Acts which created the University of New Zealand established it as a examining university with teaching colleges attached to it, a less than satisfactory solution (Beaglehole, 1937; Parton, 1979). It had no students though it did have graduates. The arrangements of colleges providing the teaching and the university the examining survived

on a somewhat ad hoc basis until 1926 when the University of New Zealand which was federal in fact, became federal in law, with the colleges as part of the University of New Zealand. The special character of the University of New Zealand that resulted, while it no longer holds, still has power as a formative influence.

Teaching was done by the colleges but examining by the university, a division that led to criticism that students focused on examinations and not on learning. Students were not required to attend classes and could choose not to do so. Educationally this was a system that was unsatisfactory, if democratic in that students could enrol for degree study even if they did not live in a university centre. In this way the chance for a university education was opened up to those who would have missed out where the system was residential. There was “little doubt ...that the established system brought university education to every door by not restricting the examinations to those who could attend university classes” (Hunter, 1940, p. 19). Thus the freedom of access which enables part-time and employed students to enrol in New Zealand universities was established early, although the impact on those who in enrolling to upskill are the subject of this study, would not have been anticipated.

The unsatisfactory aspect of this situation was the impact on standards. Hunter believed that the granting of exemptions from attending lectures had been abused with the result that:

[a] grave injustice was thereby done to full-time students, as the only education open to them was that which suited the needs of the part-time and exempted students... The exemption from lectures, considered by the Commission as allowable in exceptional circumstances, has developed into an alternative method of obtaining a degree. There can be no doubt that in this way the road to a degree was thrown open to many who did not live in a university town and who were only names to the university. (Hunter, 1940, p. 26)

This concern led Hunter to call for a plan to ensure that “a much larger proportion of students are enabled to give all their time to university work during the years they attend college” (Hunter, 1940, p. 37).

Beeby also expressed concern that the Parkyn report on “Success and Failure at the University” had revealed that the part-time system resulted in a lot of wastage of money and effort. He regretted that the University of New Zealand’s monopoly on university education meant that it had no choice but to cater for both full-time and part-time students. The whole of the system, not just part of it, had to cater for the part-timer.

Over and above this, admittedly, there is another influence that has added to the part-time rolls ... One of the characteristic features of New Zealand life in the twentieth century has been the belief in equality of opportunity for education... [Moreover,] in this time of shortage of labour many schoolteachers, public servants and the like cannot be spared for full-time study even if the country were prepared to meet the cost. (Beeby, 1992, p. 226)

Studying and learning were being undertaken at the same time by the adult part-time students mentioned here and the system accommodated this even at the expense of the full-time students. There were no requirements for students to be present on campus for academic purposes. Accommodation of this kind to the needs of the student who is also employed was then unusual in a university system. This adjustment reveals the early-established nature of the response of the university system in New Zealand to the situation of the lifelong learner.

Not until the 1960s did the majority of New Zealand university students become full-time as economic conditions improved and more employers, particularly the state services, were willing to free employees for periods of full-time study. Beeby believed “it was the extension of services to extramural students that did most to free the universities and technical institutes from the restrictive demands of the part-time student” (Beeby, 1992, p. 227). On the special nature of university education in New Zealand Beeby noted:

There has been too little concerted effort to understand the ways in which a university in New Zealand must be different from a university anywhere else. ... Apart from social theories open to dispute, there is one fact, commonly overlooked, that distinguishes our university from most others, and prevents our taking the easy course of modelling ourselves directly on some university overseas. The University of New Zealand with its constituent institutions and agricultural college has no rival; it has a monopoly for the whole country. So it cannot identify itself with one single type of university in older and bigger countries. There is no university in Britain or America that is strictly comparable with the University of New Zealand, for none has a monopoly. It would be flattering, though quite unreal, to take Oxford or Cambridge as our model, but even if we add the best of the provincial universities to the group, the pattern is still not wide enough. (Beeby, 1959; quoted in Beeby, 1992, p. 222)

In comparison with the other universities in Britain and the range of the University of London with its “external degrees, its working relations with technical colleges, and its host of external students”, Beeby considered that the University of New Zealand was more comparable to a *system* of universities than a particular university. This meant, “The responsibilities of the University to its community are wider just because it has no rivals”

(1992, p.223) and he argued that the situation in New Zealand differed from that in other countries where

in such a galaxy, there is room for a wide diversity of policy. One university may rigidly restrict its entrants, reduce its failure rate to a minimum, and draw its skirts around it at the mention of a part-time or an extramural student. But the student who is not accepted there may knock at other doors at the less desirable end of the street. Admittedly, there will still be some qualified applicants in Britain who fail to secure free places as external students in any university, but they have open to them a range of senior technical colleges giving wider alternatives than would be available to a qualified youth in New Zealand excluded from our university. (Beeby, 1992, p. 222)

While at this time alternatives to university education were limited, until the 1960s the colleges grew slowly. Not until 1963 did the colleges of the University of New Zealand become the University of Auckland, Victoria University of Wellington, the University of Canterbury and the University of Otago (Butterworth and Tarling, 1994). Later additions, the Universities of Massey (1964), Waikato (1964), Lincoln (1989), and most recently Auckland University of Technology (2000), have brought the number of universities in New Zealand to eight.

The expansion in the 1960s, bringing in many more and more diverse students, was the result of a high birth rate which produced a lot of full-time school leavers, an increased number of immigrants, and more women, including adult students (Butterworth & Tarling, 1994, p. 37). This growth meant that the universities began “to assume some of the characteristics of the contemporaneous multiversity” and that they were in a “uniquely strong” position in comparison with the polytechnics (Butterworth & Tarling, 1994).

Openness of access to university

In New Zealand, as in Europe, the dominant form of higher education was university education. There have been, however, significant differences between the traditions and systems of New Zealand and the other two countries, England and the Netherlands, considered in this study.

Legislatively, from an early stage university education in New Zealand shows some of the same openness as the schooling system, including access for women as well as men. In this address to the University of New Zealand in Auckland in 1893 the Governor, Sir William Jervois, celebrates the idea of open entry.

The word "university" implies not, as some have supposed, that everything is taught but that which is taught is taught to all. (Cheers) At one time the University of Paris contained only the Faculty of Arts and Bologna that of Law, and yet they were both rightly designated as universities, because they were, - as I hope the University Colleges of New Zealand will always be - thoroughly popular institutions. No greater mistake can be made than to suppose that universities are intended only for people of private means and learned desire. The true function of a modern university I take to be, to give to all - men and women alike - who wish to avail themselves of its every facility for higher education in whatever branch they choose for themselves. (Cheers) It marks a great era in the history of education that women as well as men are now admitted to the benefits of a university (applause), and I rejoice to find that several women of this colony have not only entered their names as students, but have also carried off the prizes and distinctions offered by the University of New Zealand. (*New Zealand Herald*, 22 May, 1883)

Butterworth and Tarling (1984) suggest that Sir William borrowed this concept of freedom of entry from the Scots but it was already in place in the other university colleges.

If the Christchurch example is relevant, the idea of an open university was not mere rhetoric. ... G.W. Russell, chairman of the board of Governors, denounced the idea that the College was 'a class institution, ... The College opens its doors to everyone; it welcomes rich and poor alike....' The idea was given additional meaning after the First World War. Entrance without examination was then allowed to ex-servicemen. Later it was extended to all over 30, then all over 21. (Butterworth & Tarling, 1994, p. 24)

In this way open entry to New Zealand universities was established and a matter of considerable significance to generations of New Zealand students introduced. Mature students, even more than school-leavers were affected by this provision which opened the door to university education for those who had left school without entry qualifications and thus facilitated the possibilities for education for occupational change.

As Butterworth and Tarling (1994, p. 24) point out, "Nor of course was it only a matter of men." This openness of entry extended to women who were first admitted to classes in 1871, shortly after the founding of the first university.

The first woman BA graduate in the Empire came from New Zealand. Welcoming Kate Edgar's achievement, the *New Zealand Herald* had proclaimed: 'in this new land of ours, female intellect and female studiousness have scope in which to display themselves.' (Butterworth & Tarling, 1994, p. 24)

The higher education of women had very promising beginnings in New Zealand. Because of their important to the study the developments which followed are returned to in Chapter 8.

Open entry to university has been a feature of New Zealand tertiary education that has distinguished it from the systems in other countries, including England and the Netherlands. According to Butterworth and Tarling this has given it two of its particular strengths: popular acceptance and equality among institutions.

‘Open entry’ indeed became a feature of New Zealand universities, as Renwick was to point out. It was in fact their strongest source of popular support and their strongest argument with politicians. It was defensible both on academic grounds and on grounds of equity, and was to remain entrenched in New Zealand’s political and educational life. It helped to give the New Zealand university scene yet another of its special features. (Butterworth & Tarling, 1994, pp. 24-5)

Comparatively then, New Zealand universities were more accessible to the general population than those in older established countries, but, before the expansion of the 1960s and particularly that of the 1980s, arguably the open nature of entry to New Zealand universities existed more in theory than in practice. Most school pupils would not have considered university as a post school destination. With comparatively full employment, job opportunities were there for school leavers regardless of their level of education or training. Staying at school to earn entry to university meant facing examination barriers, School Certificate at the Fifth Form (Year 11) and University Entrance at the Sixth Form (Year 12) which had failure rates of up to 50%, and optionally but advisedly, also undertaking an Upper Sixth / Seventh Form year. Entry without qualifications, available for those over twenty-one, was taken up by some but was not an option that would even have been considered by many.

The academic nature of university education and the preparation for this in the upper years of secondary schooling precluded it being considered as an option for the majority of New Zealanders who left school early. And it would not have been considered because, as Renwick has argued “there is a deep vein of anti-intellectualism in this country” (Renwick, 1981, p. 29).

As Beeby reports, the nature of schooling did, however, affect the general population.

By the time I became Director in 1940, the problems of the secondary school were even more acute. The abolition of the proficiency examination in 1936 had made secondary education free for all, and the raising of the school leaving age to 15 in 1944 was to make secondary education compulsory. But, by then academic tradition and practice were deep in most secondary schools, and they were finding it hard to serve two masters, the university with its prime interest in an élite, and the department [of education] with its additional concern for students who needed to be prepared for immediate entry into the world of work.

In addition the school had a third equally demanding master, the general public. The prestige of the university entrance examination with employers, parents and students was such that large numbers of students were choosing an academic education, whether or not it suited their needs - and this was the kind of education the majority of school were best qualified to offer, and were most likely to give if left to themselves. (Beeby, quoted in Carter, [1984], no page number)

The nature of secondary schooling and the provision of open entry meant that those who finished high school could continue to university if they chose. Because the numbers who stayed to the end of schooling were small, the system was not under much pressure. It was the expansion of the 1960s which meant that open entry began to be looked at with concern and the question asked, 'What if demand should outstrip supply?' (Butterworth & Tarling, 1994, p. 26).

In open entry, New Zealand universities had a source of political strength: ... the universities were open - with a minimum of obstacles - to those who chose to attend them and those who chose to do so could choose to study what they wished ... It did however, arise at a time when relatively few wanted to go to universities, and it was qualified by the financial ability to do so. Circumstances were to change; and improved scholarship and bursary support in the 1960s and 1970s speeded that change. (Butterworth & Tarling, 1994, p. 26-7)

Increased enrolments and the consequent increased cost to the state meant that open entry was no longer secure from political attack. University enrolment had doubled over the decade to 1967 when Minister of Finance Muldoon declared:

The upsurge in spending on university education points to the need for the reappraisal of the allocation of scarce resources of money and personnel to ensure they are being expended in the manner most beneficial to the New Zealand people. (Parliamentary Debates, Vol. 351, pp. 231-2)

Muldoon, who had not attended university, was less supportive than Prime Minister Marshall was in 1972.² Government focus on education was linked with national development and, recalling Fraser's aims for education, Marshall connected them with open entry.

There is I know some debate on this issue whether New Zealand with a population of less than three million, can continue to maintain an open door policy for university education. As one who had neither money nor influence but who was able to get as good an education as the country can provide, I am grateful for the opportunities which were mine. I would want to see all young people have that kind of opportunity where the only limitation was their own capacity. (Butterworth & Tarling, 1994, p. 42)

This defence was not the end of the argument, which has intensified with the growth of student numbers. University economist A. D. Brownlie³ was one of the first to suggest a market approach with students as users paying more of the cost, albeit with a concern for those less able to afford it.

This non-selective approach to educational finance would probably require several GNPs to support and is essentially inegalitarian. Superior skill or intelligence is undoubtedly more economically useful than the absence of it, but discriminating in favour of it by fiscal subsidisation will not necessarily produce a more democratic and poverty free or egalitarian society. A greater element of 'user pay' in educational finance would seem warranted, at least by the well to do for university education. (Butterworth & Tarling, 1994, p. 43)

Concerns about standards were raised infrequently. Hall, writing in 1970, asserted,

the old remedial function, so necessary in the early days of adult education, in New Zealand as in Britain, is very little in evidence. An important factor here is ease of entry to the University in New Zealand: in spite of the financial difficulties of the six universities at present, they have not yet made entry competitive, except in the Schools, (such as Medicine) whose facilities are limited. Many who would have come to adult education classes in earlier years now enter the university and, even if they are evicted after the two years or so it takes in practice to weed out those unable to benefit by university education, they have probably gained something educationally from this time spent in study. (p. 157)

The awareness of the opportunity offered by open access to university is similarly recognised today but the idea of 'weeding out those unable to benefit', while it still would find support among university staff, would no longer get unqualified support from politicians and the community, as we will see when we look at changing access and participation rates and attitudes in Chapter 9.

The debate about entry was more often focused on questions of funding than questions of standards. Usually the focus was on what the country could afford, but sometimes the costs for the student of lifelong learning were raised.

The main issue for policy [relating to lifelong learning] lies in the field of the continuing education of adults and, in particular, in forms of financial assistance that can be made available to adults who want to take time out to further their education or training. This is one aspect of the world wide interest in the reorganization of education systems so that 'lifelong education' can become a reality for all citizens who want it to be so. The New Zealand system of education already compares very favourably with other systems in the rights that are available to adults to resume their education free or virtually free of the costs of tuition. What is yet to be established is a policy that matches these rights of access by adults to schemes of financial assistance that enable them,

without undue financial hardship, to maintain themselves and their dependents while they have the status of students... Until the last few years the idea of an educational entitlement available to all citizens as a right would have been dismissed as visionary and unrealistic. It is an indication of the speed with which education has come to be seen as the recurring need of a lifetime - not simply a need that children have - that the question of financial assistance for adults enrolled in educational institutions has come to be regarded as having to be taken seriously. (Renwick, [1977]; 1986, p. 36)

This 1977 statement raised issues that still remain unresolved. Questions about financial support for those upskilling and particularly reskilling have not been addressed; the changes in the 1980s to non-interventionist policies meant that responsibility for financial costs for education for occupational change was assumed to belong to the individual.

Open entry has continued to be debated over the ensuing years with the shift in the argument foreshadowed above, becoming more and more pronounced. As we will see in the 1980s and 1990s, the dispute over the policy of open entry has been concerned less with qualifications for entry and more in terms of 'who pays?'

Technical and polytechnic education

Technical institutes, the forerunners of polytechnics, began in small, scattered ways towards the end of the nineteenth century in response to a need for trade and technical education.

Although they are part of a national system of education today, their roots lie not in some grand national plan, but in a series of local initiatives from the 1880s to provide technical instruction for those who were among the nine out of ten who went from primary school to work. (Dougherty, 1999, p. 13-14)

'Night classes' were thus established, not because of any great demand from industry for better trained workers, but rather by the initiative of groups or individuals who had a professional or personal interest in education. In this the provision of classes was not unlike the WEA (then the Workers' Educational Association) which arose in New Zealand from the wish of people to set up an organisation which they could use to enhance their lives. Like their counterparts seeking retraining today, students attended for hobby and work, for personal motivations and for employment upskilling. The impulse came from individuals, not the state, with most students paying their own tuition until 1895 when a small amount of government assistance was provided. Legislation providing for education boards and others to establish government-funded classes for technical instruction was passed as part of the Liberal government's education reforms in that year and day schools added from 1904. Unlike other types of educational institutions in New Zealand which were copied from

overseas, these technical high schools were uniquely New Zealand institutions (Dougherty, 1999).

While the initial trade and technical impulse and the nature of employment in the early twentieth century might suggest males would be more likely than females to attend,

by 1914 there were 16,602 students attending evening technical classes...[with] equal numbers of male and female students, although males dominated the industrial and agriculture courses, females the domestic and commercial courses. (Dougherty, 1999, p. 18)

Numbers grew in the commercial classes with the increase in the service sector in the 1930s, the abolition of the Proficiency examination which had regulated entry to secondary school, and post World War II as more apprentices attended night classes and later block courses. For these, attendance was part-time or fitted in with employment in blocks of time. Initially evening classes were associated with the day schools, a necessary conjunction until the need for technicians and the demand for technological training was recognised and stand alone institutes became viable (Beeby, 1992, pp. 239-243). These institutes provided equality of opportunity to a range of students - mostly male at that time - whose formal education had been truncated in the past because “no one had seen the need for a new type of worker between the apprentice and the professions” (Beeby, 1992, p. 228).

Beeby saw the institutes as not only filling a gap in the labour market but as providing a chance for further personal growth to a group of people who had hitherto lacked it, calling the result a “happy conjunction of industrial needs and personal development” (Beeby, 1992, p. 228). This belief that even avowedly practical education can be liberating intellectually, as well as providing chances for employment opportunities, applies not only to those in initial training but also to those retraining. It is a liberal perspective less evident with the rise of human capital theory.

The first stand-alone institute was the Technical Correspondence Institute, followed in the 1960s by regional institutes, whether technical institutes or polytechnics, in Auckland, Christchurch, Hamilton, Wellington and Otago. They provided education at a post-primary level which complemented that of the degree granting universities and the colleges offering teacher training so that by the 1960s,

the technical institutes firmly established themselves as an important part of tertiary education in New Zealand, alongside the universities and the teachers’ colleges. (Dougherty, 1999, p. 28)

The significance of these institutions was due largely to the uniqueness of their role as the provider of technical and trade training; whether they were adequately acknowledged and resourced is a matter of debate. By comparison with the universities, “the polytechnic sector suffered from twenty years of neglect” (Butterworth & Tarling, 1994, p. 40). This neglect was no doubt supported by attitudes to the vocational nature of much of the training and that they catered for the general population rather than for those who would enter professions. The part-time nature of many courses meant that mature students attended alongside those undertaking initial training.

Despite the variety of the provisions there were still limited opportunities for those wanting to add to their education and to retrain, activities which Hockley terms “training and mind-expanding activities for ordinary citizens” (Hockley, 1990, p. 11). As the institutes proliferated in the 1970s they responded to other needs and requests from their communities, providing the first steps in the expansion in education for adults and education for occupational change. Adult education courses were offered and ‘community’ or ‘personal growth’ courses were added alongside their primary vocational function.

This demand, Hockley suggests, reflects the failure of the formal system to meet the need of the community.

The demand for technical education and training turned out to be much greater than expected. It grew at an astonishing rate and before long the Department of Education had its work cut out trying to rationalise and co-ordinate the new undertakings. Once a technical institute became established in an area, demands for trade and technical education started arriving from unexpected quarters and at levels which outstripped the resources provided by the government. And that was not all. Some of the technical institutes began adding a part, which the planners had not foreseen, in general community education. Individuals and groups who had no expectations of the universities, having long been largely ignored by them, began to be aware that there were ears in these new institutions which were open to requests for training and mind-expanding activities for ordinary citizens which had hitherto been available mainly from organisations such as the W. E. A. operating on less than half a shoestring. (Hockley, 1990, p. 11)

Community colleges, established from 1975, also combined technical classes and non-vocational courses (Dougherty, 1999, p. 33). In this way the technical institute system showed a greater responsiveness to community needs than the universities and may thus be seen as being more egalitarian. However Ray Fargher, respected for his contribution to polytechnic education, found that even in this part of the sector, “our most cherished value-

egalitarianism” had its weaknesses. The most serious of these was that it extended neither to Maori nor to women. The consequences were:

First, an intolerance of the needs of minorities, shown in the opposition to specific proposals for affirmative action to remove disadvantages faced by women and Maoris; and in the mono-cultural nature of our institutions. Second, acceptance that individual freedoms are equated with the immediate needs of the individual employer for specific vocational training of his employees rather than the wider needs of students to develop as individuals. (Fargher, 1985, p. 14)

There were also strengths:

On the other hand individuals do have opportunities to acquire skills which help them to command wages which, in turn, will give them greater control over their lives. (Fargher, 1985, p. 14)

From 1974 the polytechnics had been able to offer degrees in conjunction with universities but not until the 1990s did New Zealand acquire a binary system like the United Kingdom with its degree-granting polytechnics (Hockley, 1990). Fargher believed that prior to this New Zealand had avoided the disadvantages of the binary system of education, as in the United Kingdom or Australia, with its associated “academic inflation or credential creep”. He applauded the way in which “the continuing education sector, including formal and informal agencies” offered a second chance to those who had missed out on further education the first time round. This phrase, ‘a second chance’, was much used in the 1980s, to describe the quest for further education and training mentioned by Hockley above, which was to change the lives of many and which began the wave of retraining. As we shall show in Chapter 8, this was particularly the case for women.

Adult and continuing education

From the beginning of the colonisation of New Zealand, informal education played a part alongside the formal. Education that takes place outside institutions, or inside these but not for qualifications, is significant in New Zealand educational history both because it indicates how longstanding is the desire for training and retraining and the acquisition of more skills; and because of the continuing tension between these aims and those of a more liberal version of adult and continuing education. Further, when lifelong learning is being considered, it is important to recognise the continuing contribution of adult and continuing education as a form of learning that, for many people, extends over much of their lives. The term ‘adult education’ has been associated with liberal education for social reform and more

recently with traditional, liberal, non-vocational education. With the wide range of provision there is often a lack of clarity about the terms ‘community education’, ‘continuing education’, and ‘further education’.

The first Mechanics Institutes were set up on board ships coming to New Zealand to educate the emigrants and satisfy the “impulse towards study and self improvement” (Hall, 1970, p. 34). This early indicator of the desire for skills training was followed in New Zealand in 1842 when Mechanics Institutes were established in Auckland and in Wellington with the intention of providing learning opportunities for workers (Hall, 1970; Dakin, 1996).

An early, and somewhat surprising, attempt to offer education outside the university was that of Professor Black of Otago University, who toured Otago, the West Coast and the Thames districts in 1884 and 1885, establishing schools of mining (Nicol, 1940).

Professor Black’s action is typical of the early generation of university teachers; they were willing to teach outside the walls when enthusiasm made an opportunity, but in a general way they were too burdened with their own work to have the time. Canterbury University College promulgated an ambitious scheme in 1901, offering courses of lectures anywhere in the university district on payment in advance of substantial fees; the latter requirement caused the scheme to be stillborn. (Hall, 1970, p. 45)

While this first attempt at distance education failed, the University of New Zealand did, in 1915, make funds available for the work of the WEA. The YMCA had been established in Auckland in 1854 and in 1878 the YWCA was founded in Dunedin from where it spread northwards (Hall, 1970; Dakin, 1996). Both of these offered educational courses but it was the setting up of the WEA in 1915, which provided a systematic approach to education for the community. Based on the British model, it was jointly sponsored by the university colleges and the labour movement with the intention of providing opportunities for intellectual development for voting people, an aim less focused on economic ends. It became independent of its antecedents and evolved a distinctly New Zealand form which differed from that of its English predecessor (Hall, 1970). Funds were only one of the problems the WEA faced but the organisation stayed close to its rigorous educational standards as the 1920 report comments:

Hampered as always by lack of funds for organisation, and even for teaching, viewed with suspicion, either as a revolutionary propagandist association or as a subsidised agency of the capitalist class, it has steadily adhered to its ideal of education as a process of self-development and self-realisation. (WEA Annual report, 1922, p. 3)

The voluntary organisation continued to receive government funding (Hall, 1970, p. 53) and to offer courses to a cross-section of the population (Hall, 1970, p. 60), leading to a statement, in the 1926 report, that prefigures Fraser /Beeby's famous one and may be one of the earliest about the provision of lifelong education:

It is quite evident now that the WEA is the final stage in the realisation of that ideal of giving free education to the individual *throughout his life*. (WEA Annual Report, 1926, quoted in Hall, 1970, p. 61; emphasis added)

The increasing awareness and concern for adult education was reflected in the *Education Amendment Act*, 1938, which specifically addressed this matter. It set up an advisory committee for adult education in each centre, attached adult education tutors to the WEA and also created the Council of Adult Education. Even during the war years the government met every request for finance from the Council for Adult Education in full immediately (Beeby 1992, p. 232). In the 1940s and 1950s the primary focus was on the provision of liberal adult education for individual and community development (Tobias, 1997). This continued until the 1960s. Then in 1963 the university departments of adult education became departments of extension studies, which took on an academic focus, leaving the essentially practical classes to others and contributing to the situation where the polytechnics were asked to fill a void in community education. The scope of the programmes offered by the WEA and the universities had diverged. For the moment both were funded but the providers of adult and continuing education would have to struggle for funding in the 1970s and 1980s.

Upskilling and reskilling for vocational purposes were in the ascendancy, exemplifying the constant tension for the development of adult education in “the interplay between the voluntary and local enterprises and regulative and centralising tendencies of institutions and the professions” (Dakin, 1996, p. 34).

Lifelong learning?

Alongside the development of continuing education in the Polytechnics and the growth of continuing education programmes in the universities, other features of the 1960s which would become significant for mature part-time students seeking upskilling were the changes for extramural students. From having been regarded as a problem by the universities, extramural students came to be seen as an opportunity by Victoria University, the only one of the original four colleges not to have a special school. The courses offered initially through Victoria University in Palmerston North alongside the teachers' college led to the

arts faculty that Massey Agricultural College needed to become an independent university. Massey University's distance education programme began to provide an alternative to traditional forms of delivery and an unanticipated change of focus (Beeby, 1992).

By 1960 the economists had discovered that education is not just an expensive form of consumption but a national investment and therefore worthy of more public financial support. It was a change of attitude we educators applauded, but some of us were not prepared for the consequent assumption that all education had to be judged by its success in delivering the educated workforce that the economy demanded. The old idea of centering attention on the rights of the individual became secondary to the rights of the community. (Beeby, 1992, p. 295)

Two moves towards vocational upskilling and adult re-entry to study initiated in the 1960s and 1970s signalled the change towards increasing numbers of mature students. Within adult education departments of universities, 'New Start' programmes designed to provide encouragement and support for adults considering university study, were offered as were other certificate programmes which also provided extension education (Tobias, 1997).

'Adult education' in the sense of

a spare-time activity ... intended to be 'liberal' in that it had nothing to do with vocational studies by intention, and was concerned to develop the individual, alone and in the group, as a thinking and feeling being (Williams, 1978, p. xv)

had been succeeded by 'continuing education', described in 1974 report of the Advisory Council on Educational Planning⁴ as "all aspects of education after school, whether full-time, part-time, extra-mural, on-the-job, vocational or non-vocational". Adult education no longer meant "the interdisciplinary field of studies which concerns philosophy, history, psychology and education" (Williams, 1978, p. xv) to the concern of Williams and others who had worked in the adult education sector as earlier defined. There were two reasons for this. The first was the ideological shift outlined above which altered the earlier emancipatory aims for continuing education to more utilitarian ones. The second was the gradual introduction of full cost recovery fees for courses in continuing education which tended to see payment for such courses as a form of investment and thus privileged courses with direct vocational aims. Thus Government funding in this area had again been directed particularly to vocational education, confirming the renewed importance of economic imperatives in educational provision.

General education and part-time opportunities

The foundations were laid from the beginnings of tertiary education in New Zealand for two other aspects which have proved crucial for the growth of upskilling in the New Zealand tertiary sector. The lack of specialisation in employment already referred to was, and still is, paralleled by the general nature of education. While secondary schools until the period of mass expansion were academic in focus, there was much less specialisation than in, for example, the Netherlands and the United Kingdom. Students might choose a science or 'arts' course of study at school but, apart from areas such as medicine or engineering which required previous study in relevant subjects, they were free to choose their course of study at university. A Bachelor of Arts degree could be embarked on by anyone who had gained entrance to university study whether by examination or by turning 21, and not, as in the other countries, only by those who had gained a place.

As has been suggested, equally important for those wanting further education has been the openness of entry for part-time students, those who in other countries would not have had the opportunity to study while they were occupied in employment or family care. That study could be undertaken part-time opened up the possibility of earning a degree to law clerks or teachers, public-sector employees or postmen. (The choice of the male term here is deliberate for those who took the route of delivering mail and studying were more likely to be male in a time when the work force was strongly gendered.) While most students were school-leavers and full-time, the pattern of mature students studying part-time was established early in New Zealand. In 1959 Beeby believed that

Within a university system some institution will have to find a place for [the part-time student] and adapt its timetables and methods specially to his (sic) needs. In New Zealand, the one institution must cater for both full-time and part-time students, and so cannot base its policy on the older universities of Britain. Over and above this, admittedly, there is also another influence that has added to the part-time rolls ... One of the characteristic features of New Zealand life in the twentieth century has been the belief in equality of opportunity for education. (Beeby, 1992, p. 226)

With the explosion in the number of full-time students in the following decade, the 1960s, all the universities gained more full-time students who thus became the dominant group. Part-timers remain part of the pattern with equal opportunity to enrol, except in limited entry courses. Access to education was granted to a student equally to any college of the University of New Zealand and then, after the establishment of the individual universities, to any of them. As Richard Mulgan pointed out:

New Zealand universities are notably equal in their academic quality and reputations. There is no clear hierarchy, no one or two universities are clearly the best to attend or work in. This is most unusual internationally. (Mulgan, 1988a, p. 11)

One consequence of this is of particular relevance to part-time and non-traditional students who are not in a position to move cities to attend a particular institution, although Mulgan's example of equal opportunity is perhaps exceptional rather than usual.

The late-starting housewife has been able to graduate from the same law school as the high-flying scholarship winner straight from school. (Mulgan, 1988b, p. 6)

Relations between the providers

The phrase, 'a seamless education', promoted by Education Minister Lockwood Smith, gained currency in New Zealand in the 1990s. Its focus on the links between the parts of the educational system is not new in New Zealand educational history but the relationships between the parts have not always been smooth. One of these has been the relationship between entry standards for university and the secondary schools.

In his lecture on the occasion of the century of the University of Auckland, "Is the University part of the education system?" Beeby reports on the meeting of the headmasters of the country's secondary schools in 1888, which chose the university's matriculation examination as the goal of the secondary school student.

The schools ... gave the Matriculation Examination that privileged place that encouraged the public to regard it as the hallmark of a completed secondary education, and eventually led to its position of dominance over secondary education. (Murdoch, 1943, p. 29)

This dominance continued as employers used school certificate and university entrance examinations as entry criteria for employment, measures for which they had not been intended or designed but which illustrate the presence of credentialism.

Another problematic relationship, as has already been mentioned, is the role of the tertiary institutions in providing differing types of education. Which of them should provide adult, continuing and vocational education has not always been clear (Hall, 1970; Hockley, 1990). At times the need has been unfulfilled, at others the distinction between different types of institutions has been unclear. For example, Hunter, among others, lamented the establishment of the practical schools such as Lincoln Agricultural College, believing "there

is evidence that the professional schools are receiving more than their due ... There is a danger that the real university will be lost” (Hunter, 1940, p. 24).

Beeby declared that horizontal links such as cross-crediting between the universities and technical institutes had been productive but he also argued for a special role for the university. He advocated,

a compromise between the ivory tower and complete involvement in practice, a compromise that is much harder to achieve than either of the extremes. It is a policy of controlled and limited commitment to the practical affairs of the world, where the limit is fixed not so much by the needs of the situation as by the demands of scholarship. It calls for wise and delicate balance between commitment and detachment. The university can lay down guidelines, but, in the end, only the individual will know when he has sucked from practical experience all that he needs to be able to retreat to his study to think about it in depth. ... It is the understanding coming from that lonely labour that a troubled world expects from the university and its teachers. For the world will find it nowhere else. (Beeby, 1969, p. 66)

This concern about the special nature of the university and cross-links with other providers is mentioned because of its relevance to the current debate about the universal provision of education. It raises questions about the best way to provide for school leavers and for those upskilling, and contributes to the discussion that surrounds the tension between universal and differentiated provision.

Conclusion

Other problems about the provision of tertiary education would arise in the last two decades of the twentieth century as we will see in the next chapter but it is appropriate to note again the significance for retraining of the three special features of New Zealand tertiary education: open adult entry, general degrees and opportunities for part-time study. These special features have meant New Zealand has provided greater opportunities for those seeking to retrain at a tertiary level than are available in many other countries, as I shall show later, using the examples of the Netherlands and the United Kingdom.

The changes in tertiary education charted in Chapter 6 would affect the opportunities of those seeking education for occupational change. Chapter 7 traces the influence of dominant political and ideological trends on the provision of retraining.

Notes

¹ Quotation from p.106 of the same text (Renwick, 1986).

² Prime Minister Marshall in the Opening Speech, Educational Priorities Conference, 15 August 1972.

³ Professor Brownlie, later Vice-Chancellor of the University of Canterbury, in a speech 'Priorities in education: a commentary' at the same conference, 15-16 August 1972.

⁴ Directions for Educational Development (ACEP, 1974) quoted in Williams, 1987, p. xv.

Chapter Seven

Education policy post 1984; the rhetoric and the reality

The roots of the economics of education [are] in William Petty's work of 1691 and Adam Smith's of 1776. In other words even if the early reformers believed in the humanising effects of education there were others who saw the economic aspects and possible economic outcomes of a "proper" education, namely that education represented economic capital, and capital that could be utilised if not exploited.

(Marshall, 1995, p. 1)

Education is a public good which must be funded by the public.

(Labour Party pamphlet, Education Forum edition, April, 1993)

The world in which we live is one of unprecedented change. It is a world of the global economy, of disappearing national economies as we have known them. It is a world in which the traditional bases of wealth are shifting from the west to the burgeoning economics [*sic*] of SE Asia. It is a world of almost instantaneous exchange of information, in which technology is having an increasing impact on the way we live and work ... It is a world in which quality of service or product is seen as the key to enterprise and national success.

(Hood, 1995, p. 1)

At the centre of this market discourse is a root metaphor of the university as a private business, with language, symbols and ideas borrowed directly from the discourse of the marketplace.... The discourse is so prevalent that even those who resist it find themselves using, and implicitly, supporting, that very discourse.

(Zorn, 1998, p. 32-33)

A strange incongruity in New Zealand education arose in the period between 1984 and the end of the twentieth century, as we saw in Chapter 5. Successive governments embraced a vision of 'The Skilled Society' or 'The Knowledge Society' and called for an increase in existing skills and the development of new skills in order to increase economic growth. At

the same time they treated education and training as a private good, something that was of benefit to the individual and should be accepted as a private cost because of the private benefits. This chapter first reviews the New Zealand system of tertiary education at the beginning of the 1980s and then investigates the changes in New Zealand tertiary education policy in the ensuing period that affected students, both school-leavers and, of particular interest to this study, those seeking retraining. In tracing the development of educational policy, especially as it applies to tertiary education, through this period this chapter refers to those concepts of public and private good that were so influential in the pervasive ideology of the time.

The barriers that resulted from the changes affected mature and returning students disproportionately. Women and those from low socio-economic groups were especially vulnerable because of their lack of resources (Lauder, 1990). As government funding dropped, their costs rose and barriers to their participation increased. Political rhetoric called for skills acquisition and reskilling but the implementation of ideology endangered the provision of opportunities to undertake education for occupational change.

Before the last two decades of the twentieth century, the tertiary education system in New Zealand was theoretically open and accessible to school-leavers and mature students. However, the actual numbers of students in universities and polytechnics were still comparatively low, despite the growth of the universities in the 1960s. The combination of social and economic barriers, and the fact that higher education was still not necessary for many kinds of employment, had meant that many potential students decided either that they did not need tertiary education, or that the opportunity costs meant the years spent in study were not worth-while.

In the 1980s and 1990s changes occurred outside the institutions which altered these perceptions and, despite rises in fees, student numbers rose. These changes were global in their causes and local in their impact as New Zealand's small economy and labour market were increasingly affected by trends and events which had their origins overseas. Education for occupational change became a significant feature of tertiary education in New Zealand.

International influences were of two kinds. As well as the impact of economic global forces on New Zealand's economy, there were the changes in higher education overseas as other countries faced the 'massification of higher education'. As we will see, New Zealand lagged behind other OECD countries in this regard, having much lower participation rates in the 1970s and 1980s than, for example, the United States, the United Kingdom and Australia.

While it is clear that New Zealand is not immune from international influences and these influences can be charted (see Chapter 9), it is also important to underscore New Zealand's own history and development so that we get a clear picture of how this interplay of forces has influenced, and continues to influence, policies and provisions relating to retraining and upskilling.

Many Western countries have felt the impact of globalisation, of increased pressures from new trading nations, of increased competition from new competitors. New Zealand in the 1980s was especially vulnerable to such international movements as its standard of living fell and its unemployment rose at rates which alarmed politicians and the public. Solutions were sought and found by Treasury officials in the role played by the state. Treasury officials were among those who deemed it necessary to restructure the way in which the state operated and who advocated its withdrawal from many areas of society in which, in New Zealand, it had traditionally operated (Jesson, 1989; Codd, 1990a; Lauder, 1990). Significantly one of these was (tertiary) education.

The New Zealand tertiary system before 1984

At this time and before the expansion in tertiary education of the 1980s and 1990s, New Zealand had a three tiered post-secondary system, with further education or training available at university, technical college or teachers' college.¹ The growth that took place from the 1970s onwards in post-secondary education in New Zealand was composed of both a rise in student numbers and the development of a new diversity in provision. Through the 1980s and 1990s there were progressively more students, more courses and qualifications, and more providers of post-secondary education. In the universities the traditional humanities and sciences, law, medicine and engineering courses were joined by education for a wide variety of careers and professions. The distinction between universities and polytechnics, the former as degree provider and the latter offering vocational training, altered as polytechnics offered a greater range of programmes and moved into offering degrees and other qualifications, sometimes dropping off their trade training.² Funding followed this move as polytechnics became regarded as research institutions (Dougherty, 1999).

For tertiary education as for so many other aspects of New Zealand society, 1984 was a turning point. Until this time education had been seen as an opportunity that should be provided for the good of society. "The New Zealand tradition has been one of regarding

education as a public good mediated through a publicly provided service” (Grace, 1990, p.27). Although it was not unchallenged, the dominant social ethos had been egalitarian.

The post-war years were a time of optimism in education, which, in a time of economic prosperity, seemed bent on a course of infinite expansion. Post war educational policies were based on the belief that education could help to construct an egalitarian social democracy in which individual rights and freedoms would be guaranteed. Education was to be the means of bringing about ‘progress’. An expanding population, full employment, and dire shortages of professionals, especially teachers, led to rapidly expanding opportunities for students to attend tertiary institutions. The rights to state funded and provided education for all seemed unassailable. (Middleton, Jones & Codd, 1990, p. viii)

Historically, New Zealand had been characterised by comparatively low levels of participation in education beyond the compulsory school ages but relatively higher participation at mature ages (Ministerial Consultative Group, 1994; Stephens, 1995). For those who were not school-leavers and wanted to study, the opportunity to be a part-time student was one which was more easily accessible in New Zealand than, for example, in the United Kingdom. The open entry policy and the opportunity to study without enrolling for a full-time course were highly significant for older, employed students, many of whom attended lectures in the late afternoon and evenings after a day at work. The barriers were more closely related to an individual’s circumstances than systemic.

Once a student had University Entrance most areas of study were open to him, or, less commonly, her.³ He or she did not have to ‘gain a place’ at a particular institution and had an unlimited entitlement to study full or part-time as s/he chose. The situation in polytechnics was less open in that many courses had limited numbers of places because they were taught in small classes⁴. Thus, ironically, in contrast to the situation in most countries, ‘higher’ or university education has been more accessible in general in New Zealand than some forms of vocational education.

Despite the open nature of these provisions the numbers of tertiary students, particularly university students, were not high (Pool, 1987). New Zealand was a society in which formal post-compulsory education was not highly valued. Only a minority stayed at secondary school long enough to sit the sixth form (year 12) Entrance or the seventh form (year 13) Bursary and Scholarship examinations. High levels of employment meant that for most tertiary education with its opportunity costs was not an option they considered. Higher incomes as a result of qualifications were an incentive for those who qualified and practised in a few professions but rewards in terms of income and status would not necessarily follow.

Monetary rewards could come from occupations which did not require tertiary education. It, by contrast, was regarded as being for an intellectual élite (Renwick, 1981).

1984 and after: individual or national benefit?

The 1984 Treasury Briefing Papers to the incoming Labour Government, *Economic Management*, signalled the beginning of the promotion of a strongly vocational view of education. When addressing educational issues these papers focussed on schools, but they pointed the way to a reconsideration of tertiary education as well.

The poor performance of the education sector has adverse effects on the adjustment of the labour market directly, and overall on the performance of the overall economy. Demand for education is substantially derived from the need to acquire labour market skills and because of this individuals have clear incentives to invest in education. (New Zealand Treasury, 1984, p. 268)

The change in attitude to the place and provision of education that was to become more marked from 1987 had begun. This change in educational policy was part of a larger change in the reconstitution of the role of the state which has affected all areas of life in New Zealand since 1984 and which Codd describes as

a dual crisis of political legitimation and economic management, the culmination of deterioration throughout the 1970s and 1980s of the post-war political settlement combined with steadily worsening conditions of economic decline and fiscal instability. (Codd, 1990a, p. 191)

The sense of optimism, the idea that the state could bring about the desired change, had declined under Muldoon's National Government with its highly centralised system being seen as having failed to deliver growth, to be undemocratic and to be authoritarian. The countering move, espoused especially by Minister of Finance, Roger Douglas, and supported by the increasingly influential Treasury, was the idea that the state should retreat from many areas which had previously been regarded as legitimately its domain⁵ (Jesson, 1989; Codd, 1990d; Lauder, 1990; Bates, 1990; McCulloch, 1990).

That education was the responsibility of the state and should be provided and funded by taxpayers had not previously been questioned in New Zealand but now the ideology of human capital which was examined and found wanting in Chapter 5 became influential among policy advisers, the Treasury and politicians. As resources became stretched, the idea that tertiary education was primarily a private good that the individual should pay for, swamped the belief that it was a public good that benefited the country, presumably for fiscal as well as ideological reasons.

With increasing participation in tertiary education there was less need to use the public good argument to promote national development. There was a neat fit between growing unemployment, the private good argument and less spending by the state. As Bruce Jesson, in referring to the Treasury briefing papers, commented:

Economic Management does not state its assumptions clearly, but it is obviously based on this separation of means and ends, the social and the economic. This has the effect of enormously reducing the government's role. Economics is regarded as a technical matter that is outside the area of political choice, and virtually all areas of society are treated as belonging to the economy. *Economic Management* has policies on virtually everything, and these are treated as matters of economic orthodoxy that are beyond political debate. (Jesson, 1988, p. 41)

According to this view the state had been 'inefficient' in its provision of education and contribution to the nation's economy; there were declining standards in New Zealand schools; and there was a causal link between this perceived failure in education and New Zealand's declining standard of living. It might seem that the appropriate response to this 'inefficiency' would be further 'investment' in education and encouragement for young and mature alike to seek further education and upskilling but this was not the conclusion drawn by the government. The effects, as we shall see, were not the encouragement of education for occupational change but, alongside the rhetoric of the need for the acquisition of skills, increased financial barriers for those seeking further education. Those wanting to upskill or reskill would face higher hurdles and depend even more on their own resources.

Further, given that New Zealand's high standard of living had been based on primary production rather than on the contribution made by an educated workforce, that 'efficiency' in education was the solution might seem a surprising conclusion but there was a sense that the world was changing. Many Western countries were feeling the impact of globalisation, of increased pressures from new trading nations, of increased competition from new competitors. New Zealand in the 1980s was especially vulnerable to such international movements and its standard of living fell and its unemployment rose at rates that alarmed politicians and the public.

McCulloch (1990) points out

As in many other western nations in the 1970s, an increase in economic, political, and social difficulties helped to stimulate discontent over the character of the education system. Economic instability threatened overall living standards and also cast doubt upon New Zealand's cherished tradition of social equality. ...[I]n this changed context, education came to seem not so much a

cause for celebration as a root of conflict; less the fount of equality than a major source of inequality. (McCulloch, 1990, p. 58-9)

At the time of the sudden election in 1984, attention was focussed on the core curriculum in schools (Codd, 1990d, p. 193) and the incoming Labour Government, under Minister of Education, Russell Marshall, followed this up by producing *The Curriculum Review*, which was greeted critically by conservative groups and Treasury. Treasury's criticism, in the covering letter which accompanied their report (29 May 1987), that the review "overlooks issues as to ... the relationship between education and the economy" foreshadows the demands that increasingly would be made of tertiary education.

The debate about state intervention

By 1987 the Treasury in their briefing papers, *Government Management*, was informing the incoming government that New Zealand was the fourth most indebted country in the OECD (New Zealand Treasury, 1987, Vol 2 p.15) and, consequently, the government "exercised stringent controls on all areas of state expenditure, including education" (Codd, 1990b, p. 199). The pressures on education as on other areas of government services were therefore the result of both a change in ideology and the result of economic pressures.⁶

The Hawke Committee on Post Compulsory Education and Training⁷ reported in 1988, proposing the introduction of a systems of fees and allowances on the pragmatic grounds that this would provide funds for the rapidly expanding sector. It also declared that it would be more equitable for students to bear a greater proportion of the cost of the education which would bring them personal benefits (Department of Education, 1988).

Boston warned of the dangers of viewing education

as a commodity to be bought and sold like any other service, rather than as something of intrinsic worth, indeed a social right. Such a perspective would challenge the very foundations of the welfare state and the pursuit of a free and egalitarian society. (Boston, 1990, p. 176)

The view of the Cabinet Committee on Training and Employment was interventionist.

There is a relationship between the economic performance of a country and the importance it places on education and training. Generally speaking, countries who put most into developing a well-educated and highly skilled workforce earn higher incomes and have a better standard of living; those who must rely on an unskilled work force remain poor and backward. (Department of Labour, 1987b, p. 12)

Even liberal commentators used the language and concepts of 'national development' when considering the numbers of students enrolled in the universities and lamenting the low participation rate. "I had not realised the extent of the crisis the data here reveal," declared Ian Pool, commenting on his study of the demographic parameters for a report⁸ which argued that New Zealand was faced with urgent policy decisions in the tertiary and particularly the university sector.

Our universities cannot continue to contribute adequately to national development unless urgent action is taken, firstly to increase secondary retention rates, and secondly to permit universities to become efficient and reduce the number of students per staff member. Without this our workforce must remain unskilled by comparison with those of other countries, developing as well as developed. (Pool, 1987, p. vii)

He argued that New Zealand was disadvantaged compared with other countries and likely to become more so, arguing for intervention as had the Cabinet Committee. Participation rates had been low in the 1970s and any increase in the 1980s might be no more than recuperation.

Such growth as there has been, has come from external students (within universities sometimes called extra-mural students) whose numbers increased by 256% over the period 1972-85. By 1985 almost 1/5 of all students were external. (Pool, 1987, p. xi)

In retrospect, Pool's comments on the growth in 'external students' seem dismissive. The significance of the increase in these students, those involved in 'lifelong learning' and education for occupational change, had yet to be realised.

'The handmaiden of the market'

The effect on tertiary education of the new conjunction of belief and increasing economic pressure⁹ was signalled in *Learning for Life* (Department of Education, 1989). Full funding by the state of universities and university students was to be succeeded by a mix of funding from government and non-government sources including institutions selling their services and a change in assistance to students in the form of the introduction of a loans and allowances scheme. The third significant element, the pressure on funding caused by the increasing participation rates, was also acknowledged.

The need for a broader base of funding for post-school education and training ... requires a greater commitment to funding from non-government sources. Government funding for post-school education and training has expanded markedly over the last four years ... but *financial constraints place an*

unavoidable limit on the level of government spending. As well, there is an acknowledged private benefit from more advanced training and education. The aim of this non-government contribution is not to displace government funding but rather to assist the continuing expansion of the post-school system. (Department of Education, 1989, p. 8; emphasis added)

The implementation of the belief in the “private benefits of more advanced training and education” would especially affect those seeking upskilling as the government focused its attention on school-leavers. All students would be affected by the fees imposed by tertiary institutions in response to the government lowering the amount it contributed. This now began to be talked of as a ‘subsidy’. The language reflected the new attitude towards the provision of tertiary education as did the targeted nature of both government funding and allowances.

The new targeting of funds not only affected individuals but also state institutions. Funds were diverted to private providers at the expense of traditional providers of tertiary education and training.¹⁰ While the private providers mainly offered post-secondary education because New Zealand no longer distinguished between this and tertiary education the funding came from the tertiary education budget. The effects on the institutions were doubly devastating.

Within the context of Aotearoa New Zealand ... the level of state funding of educational institutions and agencies ... was steadily eroded. These institutions and agencies were forced to raise their fees and charges. At the same time the state became involved in the privatisation of post-compulsory education and training. (Tobias, 1999, p. 116)

As optimism about the economy and New Zealand’s place in the world declined, so too had the belief of politicians and policy makers in the efficacy of education and its ability to deliver the good society. A division grew between those who valued tertiary education as a public good which enriched the lives of individuals and society, and those who valued it because it enhanced the economic contribution individuals were able to make. According to Gerald Grace, writing in 1989, there was “a major cultural, ideological and political struggle in progress” as to whether

education [is] a public good which should be mediated through a publicly provided service or ... a commodity in the market place which should be mediated by the normal operation of market forces. (Grace, 1990, p. 27)

Opinions have increasingly been polarised in the last two decades between those who consider education a public good and those who consider it a private one. The latter belief

rests on the assumption that tertiary education delivers benefits primarily to those who undertake it because it is assumed graduates have greater access to economic benefit through greater earning power.¹¹ This view has, in New Zealand, come to be associated with its most vocal proponents, the Treasury and the Business Round Table.

The New Zealand tradition has been one of regarding education as a public good mediated through a publicly provided service. That tradition is currently under challenge from agencies which want to assert that education is a commodity in the market place like any other. ... The leading agency in formulating these challenges has been the New Zealand Treasury in its major publication *Government Management: Brief to the In-coming Government Vol II: Education Issues*. (Grace, 1990, p. 27)

Grace discusses the concept of public good as analysed by the Treasury pointing out that the differences between subjecting the concept to economic scrutiny, and valuing the concept of the consumer, results in a different perception from that of the public good and the valuing of non-economic values such as citizenship. At its heart is the human capital theory considered earlier.

Lauder's reference to education as 'the handmaiden of the market' (1990, p. 12) reflects the change from viewing education as worthwhile in itself for individuals to viewing it as a commodity. According to this view, people invest 'rationally' in tertiary education in order to obtain higher earnings and more interesting and satisfying work, benefits which outweigh the direct costs of study and the indirect costs in terms of foregone earnings (Stephens, 1995). 'Commodification' is a key concept as is revealed in the Treasury's 1984 briefing document cited earlier:

The poor performance of the education sector has adverse effects on the adjustment of the labour market directly, and indirectly, on the performance of the overall economy. *Demand for education is substantially derived from the need to acquire labour market skills and because of this individuals have clear incentives to invest in education.* To the extent that the responses of the education sector are overly lagged in adapting to changes in underlying demands, labour market adjustment is impeded rather than assisted. (New Zealand Treasury, 1984, p. 268; emphasis added)

The language of the market and of investment came to dominate discussion of educational policy. As Zorn (1998) points out (in the quotation at the head of this chapter) the discourse of the market has taken over hegemonically from the discourse of education. The prevalence of this discourse dominated the discussion on the changes in funding which followed the National Government's election in 1990. This shift can be seen as a form of ideological capture. Just as Treasury officials increasingly expressed concern about

traditional pressure group influence on state policy and thus, for example, middle class capture of tertiary education, they were themselves captured by ideological constructs which dictated their views, often regardless of evidence.¹²

Funding Issues

Prior to 1990, though there were opportunity costs in being a student in New Zealand's tertiary institutions, education was available and provided by the state at a minimal cost.

As Stephens records,

most New Zealand tertiary students paid minimal fees and the dominant state funding also provided a high proportion of full-time allowances to offset their living costs. (1995, p. 59)

Bursaries covering (all but 10 percent of) the fees, and allowances were available to all those who qualified, a more generous provision than in most OECD countries (Boston, 1992c, pp. 16-7).¹³ The barriers to participation that existed were related chiefly to the socio-economic backgrounds of the students. Also, in a society with high employment and where education was not highly regarded, there were few rewards for the individuals undertaking a course of study. Nevertheless the expectations in New Zealand society, like those overseas, were that there would be an increasing number of students entering higher education, with the costs being funded by the state. The availability of tertiary education had not yet been affected by the convergence of the ideology of the market and the costs of increased participation.

In 1994 the Todd Taskforce defined tertiary education as a 'consumption decision', declaring that individual users captured most of the benefits of higher education in their own higher lifetime earnings or increased utility (Ministerial Consultative group, 1994). As a result of government action on the Todd Taskforce recommendations both fees and allowances were affected and a loans scheme introduced.

Study Right and non-Study Right fees

The two tier system of tuition fees defined students as Study Right or non Study Right students. The former, those who entered tertiary education below the age of twenty two, were funded at a higher level than the older students who comprised the latter group. While intended as an inducement to school-leavers to enter tertiary education, this policy clearly discriminated against mature students. It acted as a disincentive for both those who missed out on tertiary education as school-leavers, and also to those wished for further education whether for its own sake or in order to upskill or re-skill.

Stephens referring to the reliance placed on economic growth through training and skill development, points out the consequences.

It is those mature and second-chance students who are most likely to be adversely affected by the introduction of fee, *but it is their continued participation which is necessary if New Zealand is going to increase its average skill level.* (Stephens, 1995, p. 60; emphasis added)

Government policy in this instance, by discriminating against those wishing for further education and training, had also impeded the increase in participation in tertiary education it had been seeking. Substantial fee differentiation for undergraduate courses and charging mature students higher fees than school-leavers, were, Boston (1992b) points out, not common practices within the OECD. As 66 per cent of mature students were women, women were disproportionately affected. Even more importantly

this favouring of school-leavers at the expense of mature students is discriminatory, inequitable, and inefficient, and represents one of the most unsatisfactory aspects of the new policy framework. ... In the past, the tertiary system has ensured that those, who for one reason or another, did not proceed to a tertiary institution after leaving school were able to do so with relative ease later in life (the principle of universal eligibility). Such opportunities for a 'second chance' were all the more important because the system of assessment at the secondary level prevented many school-leavers from immediately obtaining a university education. National's decision to subsidize mature students at a lower rate than school-leavers, thereby making tertiary education less accessible to older students is thus contrary to long standing educational traditions in New Zealand. The new policy is not only inequitable, it is also inefficient. *By rejecting the concept of a life-long education, the new policy will make it more difficult for people to re-train or switch careers and thus make the best use of their abilities (especially those who lack the financial support of their employer or those with limited savings). Given the current high level of unemployment and the widely recognized need to improve the skills and adaptability of the New Zealand workforce, such an approach lacks economic logic.* (Boston, 1992a, p. 191; emphasis added)

Mature students in New Zealand had access to tertiary education, better or at least as good as in any OECD country, but now discriminatory funding limited their ability to take up this opportunity. The critical requirements for lifelong learning include equitable access which extends to funding as well as entry qualifications. With these policies New Zealand provided access to tertiary education which encouraged lifelong learning but not the funding which facilitated the continued learning of mature students.

Student loans

The 1994 changes meant also that the tertiary student allowance was much more strictly targeted, with students aged 16-24 having their allowances means-tested on the basis of parental income (Boston, 1992a). Students 25 and older benefited from this policy because they were eligible for allowances but most would also need to supplement the amount provided by accessing the loan scheme. Some of the problems with the scheme were foreseen by, for example, Boston (1990a, 1990b), Boston and Dalziel (1992), Stephens and Boston (1994). Stephens (1995) was one of those who pointed out how much more difficulty women would have in repaying their loans, because of their lower earning power and because those who have a period out of the workforce whether for child minding, unemployment or overseas travel would find their debt mounting up.

Even the Minister of Education recognised that

it would take the average male 15 years to repay a student loan, and the average female 38 years, due to the differences in average male and female earning profiles. (Stephens, 1995, p. 64)

In 2001 the New Zealand Students Association noted that policy changes had narrowed the gap between male and female repayments “to 14 years for men and 28 years for women, but this still means that the average female graduate can expect to take twice as long as the average male graduate to replay their Loan – and pay considerably more interest in total” (NZUSA, 2001, p.2). The policy had been established and students would, literally, pay the price.

The New Zealand example has, however, been used internationally to justify charging students for their tertiary education. “Charging fees is socially just,” declared *The Economist* (1997, p. 10) traversing the arguments on the benefits to the individual in its report on universities, ‘The Knowledge Factory’, and supporting the idea of student loans on the basis of the New Zealand experience. It suggests the Australian loan scheme introduced in 1989 has not affected the social composition of the student population. “Nor does a similar scheme introduced in New Zealand seem to have deterred poorer students from embarking on a course of higher education” (*The Economist*, 1997, p. 11). Evidence to support this assertion is not given.¹⁴

Criticism of the shortsighted nature of the policy, predicted by commentators such as Boston (1990), has been vindicated by recent concern in New Zealand about the costs for individuals and the nation. For individuals the costs are those of having incurred a (large)

debt at a time when their careers are not yet established and of the impact of the loan on, for example, their ability to acquire a mortgage. For the nation the costs are the losses of educated young people leaving the country without paying back their loans. For those graduates who do not return the loss is thereby compounded. Rather than being equitable, the loans system appears to have created barriers (Stephens, 1995, 1997; Barnett, 1999, p.5; Brockett, 2000, p.7). According to a report by the Office of the Auditor General (2000), though the student loan scheme was established in 1992 ostensibly to assist students to overcome financial barriers to undertaking tertiary study, the impact of the scheme on the tertiary participation rate is unclear. Neither does the Inland Revenue Department collect and analyse information on repayment patterns, which would help in accessing more appropriate debt provisions. The loans scheme now looks like a decision made without sufficient investigation of the possible consequences.

Policy approaches and women

Education policy intersects with other social policies which affect whether or not an individual takes up the opportunity to retrain. While we look in the next chapter specifically at the retraining of women in the light of the historical and ideological analysis of the New Zealand education system, we can prefigure this discussion by assessing whether the policy alternatives of interventionist / state support or market approaches are better at facilitating the retraining of women.

The first of these, the institutional model, is based on a social-democratic philosophy of citizen entitlement, with the state having responsibility to provide assistance to citizens on the basis of need and with less reliance being placed on family and charitable support. According to the residual minimal model individuals are expected to provide for the bulk of their needs themselves via the market, their family or voluntary agencies, with the emphasis being on self-reliance and individual responsibility. I will briefly illustrate how shifts in social policy in the last three decades from the former to the latter model have moved from facilitating women's access to education for occupational change to inhibiting it.

The institutional approach to retraining which regards women as individuals, rather than family members is exemplified by the policies of the Labour Government of the 1970s and even, to a lesser extent, by those of the Labour Government in the early 1980s.¹⁵ A clear example of such a policy is the introduction of the Domestic Purposes Benefit in 1976 since it provided support for those women (and men) and their dependent children who had no

other family income. The Domestic Purposes Benefit is an unsurprising measure in an institutional welfare system as it reflects the view that the state is responsible for caring for those of its citizens who cannot provide for themselves and the stigma originally felt by recipients has been lessened, although not obliterated, as it has become accepted as part of the welfare system. Introduced by a Labour Government its provision has continued to be part of policy even with changing governments, and its extension to providing funding for recipients to undertake education for occupational change has been of great importance for women retraining.

By contrast as we saw earlier, the Study Right policy had the converse effect on women seeking to make up educational deficiencies before returning to the paid workforce since they were assessed higher fees presumably on the assumption that the market and they could bear such fees.

Jesson contends that this philosophy was limited in its application and that, before the dramatic move towards market policies in the 1980s, in many respects New Zealand,

allowed no scope for the specific interests of groups such as women and Maori. Nevertheless, for fifty years the country enjoyed a remarkable degree of social harmony. Between 1984 and 1987 the historic compromise was cancelled. (Jesson, 1989, p. 9)

The free market policies of the Labour government were followed by shifts in other areas until with the election of the 1990 National Government there was a clear move to a residual welfare system.¹⁶ An investigation of the National Women's Policy produced for the 1990 election reveals that:

Government policies must provide choice and the opportunity for women to improve their lives, increase their independence and develop their potential ... so that they can combine family life with the career of their choice

but also makes clear the aim of encouraging women

to develop new skills and not to be dependent on welfare. (O'Regan, 1990, p. 1-2)

When Minister of Finance in 1992, Ruth Richardson, talked of the state stepping back and intervening only "when families fail", she was determined to remove the assumption that all the needs of members of society could be addressed by state action and to "achieve a permanent and substantial reduction in the human cost of welfarism" (Armstrong, 1992, p. 235). This policy clearly had implications for women since the assumption was that women would have to be supported by their families in the first instance in seeking education.

Another indication of attitudes to welfare provision at that time was the suggestion, since implemented, by the then Minister of Social Welfare and of Women's Affairs, Jenny Shipley, that eligibility of Domestic Purposes Benefit recipients be reviewed. Instead of those who received the benefit being able to do so until their youngest child turned sixteen or left school, this age would be lowered with the possibility of a work test being required. Not surprisingly, given the difficulty of the beneficiaries competing for jobs without it, retraining was also being mentioned. Until that time the Domestic Purposes Benefit stood apart from other benefits in that those receiving it were entitled to an allowance (the Training Incentive Allowance) which paid some or all of their tuition fees for tertiary courses. The amount had been cut back but was still then a more generous provision than other beneficiaries received, no doubt reflecting the fact that before most of those on the Domestic Purposes Benefit can move from it into employment they will require training. The particular form of such measures has thus had considerable impact on the retraining of women in this country.

The residual model is also exemplified in the 1993 announcement by New Zealand Qualifications Authority Project Director, David Lythe, in 1993 that the days of education being seen as *just* (my emphasis) a public service were over. Lythe believed the parallels between the skills and qualifications reforms taking place here and abroad had important implications for the New Zealand economy and its workforce. "The key theme running through public debates on education in the USA, Canada and the UK seems to me to be a shift away from education viewed as a public service to education as a national strategic investment" (Lythe, 1993, p. 2). In this, as in other statements such as his advocacy of a 'seamless education system', Lythe's statement shows that the aim of national education targets became that of creating "a more flexible, skilled and competitive workforce". However without state support, such a policy, placing as it did the onus for retraining on individuals, disadvantages women seeking education for occupational change. Furthermore, its emphasis on credentialled learning devalues women's non credentialled skills and experience.

Private providers joined the state institutions which traditionally provided education and training and the courses provided for the unemployed had their criteria narrowed, so that fewer qualified for the TOPS scheme of the time than had for the previous government's Access scheme. As such schemes have often been used as retraining opportunities by women it is pertinent to note that when TOPS replaced Access the eligibility criteria

changed, removing people on the Domestic Purposes Benefit from the list of those eligible. Whereas Access training providers were given extra funding for Domestic Purposes Benefit trainees, people on the Domestic Purposes Benefit were only eligible for TOPS courses if they had been registered as unemployed for six months. Again women were disadvantaged by this shift in policy since many were not able to register as unemployed.

The illustrations above show that women were significantly vulnerable to social policy changes created in response to the ideological shift from the entitlement model to the residual model of welfare provision in that these changes provided disincentives for women seeking education for occupational change. It is not without interest that these shifts took place at the same time as unemployment became a significant problem and that the policy shifts had the potential to return women to unpaid work and their traditional position as a residual workforce and to seeing their skills as having the lowest social value.

The seamless education system

There has always been a vocational element to much higher education, such as that associated with the preparation of an educated élite and with entry to the professions in the Middle Ages when monks acquired literacy as part of their commitment to a 'higher vocation'. Law, medicine and teaching at advanced levels were some of the vocations which had for some time required higher education. In the 1980s, in New Zealand as in other countries, this link was extended to other areas. Nursing education was one of the first of these areas, moving first from the hospitals into the polytechnics and then becoming a degree course. The growth in degree courses such as in journalism, tourism, and leisure studies in the universities was paralleled by the establishment of similar courses in polytechnics in some of the same subjects and others as well: art and graphic design, electronics, radiography, health science and computing. This "blurring of the distinction between the latter-day technical institutes and the universities" (Dougherty, 1999, p. 57) resulted, in the 1990s, in some polytechnics seeking university status and others seeking mergers with universities.

A move designed to blur such distinctions even further and consolidate the links between education and vocationalism was the establishment in 1990 of the New Zealand Qualifications Authority (NZQA). Established under Education Amendment Act, 1989, the authority was charged with developing a framework of national qualifications in secondary and post-secondary qualifications (NZQA, 1991). It aimed to go even further than the

Scottish vocational qualifications system (Scotvec) on which it was based and set up a framework for all educational qualifications in New Zealand with no distinction between academic and vocational training in the post secondary arena; all qualifications becoming part of a seamless web of courses, programmes, certificates and degrees (Peters & Roberts, 1999). The motivation for this was the familiar reference to the contribution of education to the national economic interest¹⁷:

We must improve our performance and our skills base if we are to survive in a competitive world. Education and training within the new Framework is critical to that success. (NZQA, 1992, p. 18)

To those seeking retraining the ‘seamlessness’ of the framework appeared to offer much because of increased portability of qualifications, greater opportunities for cross-crediting and the introduction of Recognition of Prior Learning, RPL. Acceptance that the existing system of vocational qualifications was unsystematic and uncoordinated was one of the reasons for the Framework concept being greeted initially with enthusiasm by many in the community, even those such as trade unionists¹⁸ and women’s groups¹⁹ who were often suspicious of government policy. They welcomed the recognition which the introduction of RPL was expected to give those who had skills but not recognised qualifications.

But, as the Framework became established, the vocational nature of the plan was greeted with reservations by educationalists such as Tuck who commented on the discourse in which the vision was framed.

The vision that the NZQA and the Minister of Education have for education is probably best described as a comprehensive seamless instrumental education, where the goals are determined primarily by economic imperatives. Users acquire skills and qualifications, which they market to obtain an economic return on their investment. (Tuck, 1994, p. 232)

Challenges to the hegemonic use of the market discourse ensued from educationalists, and in particular from the universities, which opposed their degrees being included on the Framework. There was distrust of the new paradigm, on grounds that Marginson articulated as being “the convergence of general and vocational education, with its accompanying emphasis on learning outcomes is essentially an economic reform” (Marginson, 1993, p. 170). This new paradigm contrasted with what an NZQA spokesperson, in a surprising, and possibly revealing comment, described as “the old paradigm of education as the pursuit of knowledge” (Barker, 1995, p. 19). For NZQA’s Chief Executive David Hood, the big challenge was “to change entrenched attitudes and establish an education and training

culture” (Hood, 1994, p. 40). The matters about which he believed there could be no debate included the blurring of boundaries between ‘academic’ and ‘vocational’, boundaries which he believed did not exist (Hood, 1995, p. 1).²⁰

Others, even international observers like the OECD, in the 1998 report on *Redefining Tertiary Education*, were less certain than Hood about the direction.

In New Zealand the term ‘seamlessness’ has been adopted as a signal of the direction government wants to take in creating a more coherent education system. But no country can be sure of the shape of the garment that is being crafted and pieces of cloth often fit uneasily together. (OECD, 1998, p. 15)

Changes in polytechnics were a significant step towards blurring the boundaries. When technical institutes were first established there had been enough well-paid, non-credentialled jobs available. By the 1980s many of these jobs had disappeared leaving the country with historically high levels of unemployment. Because the polytechnics lacked the capacity to take all qualified applicants, a more responsive polytechnic system was seen as a remedy. Delegating decision-making to the individual institutions, introducing a student-driven funding system, and rationalising the qualifications system were seen as the means for ensuring this (Dougherty, 1999, p. 45).

The tradition of in-service training, where the student gets a job and then undergoes part-time training, either in their own or their employers’ time was replaced by pre-employment training. Students undertook initial, e.g. pre-trade training full-time at a technical institute before gaining a job or an apprenticeship (Dougherty, 1999, p. 56). For women and some older students there were advantages to this system; under the previous arrangements employers had tended to show preferences for male-school leavers thus discriminating against women and older applicants.

Dougherty notes the increase in adult students, as well as the shift from part-time to full-time training, as changes outside the educational system affected those in, or aspiring to, the workforce. The numbers of adult students increased

as more and more people found that a single job would not sustain them from the day they left school to the day they retired, and they opted or were forced to retrain in mid-career. (Dougherty, 1999, p. 57)

As we will see in the discussion of the recognition of prior learning, the establishment of NZQA offered less to those upskilling and reskilling than it initially appeared it might, but

there were gains, and some congruity between the direction of policy and the needs of those returning to further vocational education.

Adult, community and continuing education

The more vocational focus of education also affected adult, community and continuing education, despite these having traditionally focussed on non-credentialed education. The changes in these two decades, the 1980s and 1990s, saw diversification in adult and continuing education in response to pressures, particularly financial ones. The new funding framework favoured the provision of professional development programmes for those who could afford high fees and personal development programmes likely to appeal to those with high incomes (Tobias, 1997, p. 12). Adult education, in New Zealand, as in other Western countries, was moving to a competitive model with the emphasis on recurrent and lifelong learning for professional updating.²¹ In the England, for example, adult education has acquired a more vocational focus in recent years, reflecting an increased emphasis on training and retraining for employment by government and by individuals participating in further education (Tuckett, 1995). For many adult educators for whom a sense of social purpose is important, this change from focusing on the margins to catering for the market has been a disturbing one (Elsley, 1994). Tobias, at a Jubilee Symposium, 1997,²² listed some the effects of globalisation on adult learning in New Zealand as increasing credentialism; narrow vocationalism, de-politicisation, avoidance of controversy, increasing privatisation, decreasing levels of state funding and an increasing promotion of the ideology of individualism, the last of these as being not a New Zealand tradition, but a change since the 1980s.

Results of changes

The gradual shift in ideology from the entitlement model of state policy to the residual policy created changes in tertiary education in the 1980s and 1990s which were both ideologically based and connected with the need for increased funding as participation rates rose and tertiary education expanded to cover more kinds of education and training than it had previously. The strands of the purpose and funding were wound together by the idea that education is a private good that an individual undertakes for their own benefit. As I have indicated earlier, this was at least in part a marriage of convenience. Since global and local economic forces created high levels of unemployment in New Zealand, demand for tertiary education rose to allow young and old to compete with credentials for a limited

supply of jobs. The state's capacity to fund this increasing demand through the entitlement model was limited and so the advent of the residual model provided a rationale for reducing state support. This took place in other areas such as health and welfare as well, of course, where greater demand exceeded the capacity of the entitlement model to provide. Similar changes were occurring in other countries.

Formerly well-resourced tutorial systems, in Australia, New Zealand and the United Kingdom, for example, have been abandoned or diminished. (OECD, 1998, p. 26)

Awareness of the increased link between education and preparation for employment in a wide variety of areas is also essential for understanding the changes that have taken place. It is also crucial for a full appreciation of the positions of those on both sides of the public - private good debate. More than previously, there are incentives to upskill and reskill, to improve ones' qualifications and life chances. Again, the drivers for this may be the perception that the state's capacity to pay its way depends on an economy in which education is conducted largely for economic reasons.

However, to understand the increasing number who wish to retrain and their desire to do so, an understanding of the social context, barriers and incentives, is also crucial. Education has come to be regarded as the primary way of enabling a life change. It is sought both as an end, a good in itself and as a means, a way of changing and improving one's social and employment position.

Conclusion

Major changes in political attitudes to the state provision of education in New Zealand after 1984 resulted in incongruities between the stated policy and the actual provision of retraining. At the same time as politicians were making calls for increased levels of skills and calling on individuals to upskill, state support for students in tertiary education was decreasing. At the same time as more people began to seek to upskill or retrain, support for individuals seeking to retrain at tertiary level was lessening. While individuals began increasingly to respond to the government's exhortations to increase their skills and qualifications, the state, rather than aiding them in this venture, was in fact making it more difficult. Ironically while the government, through NZQA, had been seeking to establish a 'training culture', and adult returners had increasingly been seeking vocational education, increasingly the latter had been finding obstacles to acting on their resolve. Whereas 'equality' early on had tended to mean that education, while free, was available to those who

were in a financial position to take advantage of it, now the ideology of equality had been superseded by one which not only required that students were able to support themselves financially, but also required them to pay substantial fees for the privilege.

Concluding Section 2

Chapter 7 concludes Section 2 which has traced the impact of ideology, policy, history and particular features of tertiary education in New Zealand as they affect retraining, particularly education for occupational change.

Section 3, which begins with the next chapter, provides a closer look at the individuals who are seeking education for occupational change. It first considers women as pioneers with a Christchurch case study which traces the changes over time for this group of retrainers. Access and participation locally, and globally and in the two countries chosen for comparison are investigated using a variety of methods, including an account of the provision of tertiary study in three cities. Different groups of 'retrainers' are identified. The results from a survey of students at a Christchurch tertiary institution conclude the investigation of the mature individuals who undertake retraining.

The next chapter, Chapter 8, illustrates the changes which have been documented in this and the previous chapter by showing how they affected women who sought to retrain. We will find that every twist and turn in ideology and policy had its effect registered on women who seek to retrain. They are a social group which has been highly sensitive to such changes because women have often need retraining in order to find a place in the paid workforce but frequently have lacked the means to pay for it themselves.

Chapter 9 considers questions of access and participation in more detail, highlighting the increase in education for occupational change worldwide. The discussion of statistics helps to explain why the increase has been largely overlooked and a comparison of the New Zealand situation with that in the Netherlands and the United Kingdom aids in understanding the special nature of education for occupational change in New Zealand.

Chapter 10 focuses on the providers and the necessary provision for adult learners of particular types before Chapter 11 reports on the students themselves, their motivations and experiences in taking up the available opportunities for education for occupational change.

Notes

¹ This was a post-secondary, not a tertiary, system in that only university education required completion of secondary schooling and the passing of an entrance examination. Even in this case there were exceptions, as with students over twenty-one. In New Zealand, colleges for training teachers existed separately from universities but most training, such as that for nurses or apprentice carpenters, took place away from educational institutions. Technical colleges provided the block courses that apprentices were required to undertake, alongside their training on the job and gradually added other courses such as those for training for secretarial positions. Their emphasis was on training, for the workplace, not on educating the individual. Unlike their successors, the polytechnics, they did not provide higher qualifications. Teachers' Colleges, later known as Colleges of Education, focused on training teachers for primary teaching with secondary teaching as an additional focus, and later also early childhood teacher training.

² As in the case of AUT which moved first from being ATI, Auckland Technical Institute, an institute providing technical and trade training to become AIT, Auckland Institute of Technology a degree granting institution. Then in 1999 it became AUT, a 'University of Technology', thus illustrating that credentialism is a process that applied to institutions as well as to individuals. Colleges also began to offer degree programmes.

³ In practice this meant that there was open entry to university for those who were academically qualified. Only in a few areas such as medicine and engineering were places limited to those who met special criteria and, unlike countries such as the United Kingdom and Australia, the entry qualification entitled a student to attend any of New Zealand universities. The majority of those choosing university study went straight from school but employment was easy to find and many occupations required no qualifications, only on-the-job training. Alternatively entrance was open at most universities to adults, although for many years the University of Canterbury required entry through its Liberal Studies programme or some equivalent programme of study.

⁴ This was true for many subjects which were primarily vocational in nature with a practical component such as catering and engineering, and even for degree course such as nursing and journalism. In the case of subjects like accountancy and secretarial courses there were fewer restrictions as these could be taught through lectures and did not require specialist provision.

⁵ "Once we come to see education as a commodity rather than a public good this has important consequences for how we view the legitimate role of government in education." (Lauder, 1990, p. 29)

⁶ The influential position of Treasury added weight to its view that:

“government intervention is liable to reduce freedom of choice and thereby curtail the sphere of responsibility of its citizens and weaken the self-steering ability inherent in society to reach optimal solutions through the mass of individual actions pursuing free choice without any formal consensus”. (Treasury, 1987, Vol 2, p. 14)

Treasury’s influence was further strengthened by a change in the committee structure of Cabinet which meant that Treasury’s policy advice took precedence over that of other government departments (Codd, 1990a, p. 196).

⁷ According to Easton (1995) the report, despite its title, was not about education but, “in effect a report about training after compulsory schooling” (p. 25).

⁸ The report was commissioned by the Vice Chancellors’ University Review Committee.

⁹ Concurrently, because of the high rates of unemployment, the government was grappling with issues of training, as mentioned in Chapter 4. In 1985 *A New Deal in Training and Employment Issues* was released advocating a new training scheme, The Training Assistance Programme, as a replacement for all the existing training and fully subsidised work schemes (Department of Education, 1985).

¹⁰ In 1994 there were 779 private training establishments (PTEs) registered with NZQA; in 2001 there were 841. Most PTEs are companies (63%) with the most of the rests being trusts (21%) or incorporated societies. Most have a vocational (29%), employment preparation /second chance education (20%) or corporate/ fee for service (24%) focus. Some PTEs have a Maori (19%) or Pacific Islands (4%) focus. PTEs students are concentrated at certificate and diploma level and are more likely to be enrolled in a Level 1-3 national qualification than other students. (Education Directions Ltd, 2001)

The World Bank cautions that:

“Even when markets work well and students receive a quality service, private institutions may still fail to serve the public interest. For profit institutions must operate as businesses, facing the market test and trying to maximise the return on their investment. It may not make good financial sense for them to invest in public-interest functions and therefore they may invest in certain subjects and types of higher education, even if these are important to the well-being of society as a whole. The public sector thus retains a vital and, in our opinion, irreplaceable role in the higher education sector.” (World Bank, 2000, p.38)

¹¹ Lauder traces the view of human nature behind this assumption back to Hobbes and Adam Smith. It is dependent on the idea that humans are essentially self-interested and focussed on their own advancement (Lauder, 1990b, pp. 3-8).

¹² In reporting on an OECD conference, Ministry of Education senior official Jane von Dadelszen, acknowledged, “Many countries have so far resisted introducing fees for full-time undergraduate school-leavers”. She emphasised, “No one I spoke to in Europe had data showing fees to be a barrier” although data from Australia suggested, “price does restrict choice” for some groups. The conclusion that “This supports our approach of monitoring participation and *increasing costs to students only gradually*.” (von Dadelszen, 1999, p. [6], emphasis added) is not one that everyone would necessarily draw. Since few European democracies charge any fees (and certainly did not do so in 1998) it is not surprising that data is not available on the effects of fees.

¹³ Even more significant for most students was the availability of employment over the summer, which enabled them to save for living expenses during the academic year, although this applied more especially to the male majority who were able to find better paying jobs than the female minority.

¹⁴ Related views are expressed by senior policy analyst Jane von Dadelszen who, in comparing the British and New Zealand systems, suggests the opposition in New Zealand resulted from the way it was promoted. “ Britain is shifting ...to a scheme more like the New Zealand scheme. ... The shift to income contingency in Britain is being seen as a significant improvement for equity reasons and is being presented as free education for all, with those who earn the most being subject to the highest marginal tax rates. The New Zealand scheme has these same characteristics. Presenting our scheme this way may have improved its acceptability.” (von Dadelszen, 1999, p.[7]) Given that New Zealand graduates who do not earn enough to pay off their loans promptly gather larger and larger debt it is hard to see how they are getting ‘free education’.

¹⁵The institutional view education was a public good meant that the state had a role in encouraging and facilitating the uptake of education by disadvantaged groups. For example, twice a Labour Government set up a policy council to advise it on matters affecting the education of girls and women. The National Advisory Council on the Education of Women was established and later the Women’s Advisory Committee on Education. The institutional approach also embraced such moves as the 1980’s ‘Girls Can Do Anything’ campaign which was not only a national publicity effort to raise the awareness of girls about the opportunities open to them in non-traditional areas but also involved a pilot scheme assisting young women into work at the Marsden Point refinery. Similarly the FAIR scheme was concerned with providing financial support to encourage employers to take on female apprentices. In each case the groups were disbanded by a subsequent National Government which regarded the policy advice which suggested intervention in this area as both unnecessary and inappropriate.

¹⁶ Cabinet Minister Simon Upton announced in his speech to the National Party Conference in 1990 that in the ensuing decade the New Zealand state would face perhaps the most radical reorganisation it had experienced in sixty years and that it stood poised on the brink of transition from the welfare state

to the 'enterprise state'. Cuts in benefits and supplementary measures such as the provision of state housing took place and eligibility for some benefits was narrowed. The principle that families, not the state, should provide for their members is shown in some measures, while others, such as the six month stand-down that can operate before some workers are eligible for the unemployment benefit, or the terms for receiving superannuation payments, reflect the principle of citizens providing for themselves in old age and adversity.

¹⁷ The same phrases still continued to appear in pronouncements by officials and politicians as this statement by Minister of Education, Lockwood Smith shows: "The economy of the late twentieth century, requires a very different approach. Unskilled jobs are being progressively eliminated through technology, while new jobs - requiring higher levels of education - are being created" (Smith, 1996, p. 6).

¹⁸ Angela Foulkes, Secretary of the Council of Trade Unions, was one of those who anticipated greater equity as a result: "The Framework is flexible, nationally recognised and allows people to take the skills they learn on the job around the country and be recognised. It's a new concept and at the end of the day I believe it will allow people to be better paid" (NZQA, 1992, p. 22).

¹⁹ I convened the group which prepared the submission of the National Advisory Council on the Employment of Women on the establishment of the Framework. Like others with similar interests we welcomed the opportunities we envisaged being opened up for women to gain qualifications and acknowledgment of their unrecognised skills.

²⁰ For the polytechnics there were many changes as the Framework was developed and courses were modified so that they could be registered on the Framework at a designated level. Processes for course approval and certification were implemented, for post-secondary and tertiary courses including degrees offered by the polytechnics. Increasing competition among course providers was achieved by extension of accreditation to new public and private providers. The aim of linking all private and industry training as part of the tertiary system of education administered by New Zealand Qualifications Authority in order to establish a 'training culture' in New Zealand was partially achieved, the exception being university education.

²¹ In terms of ideology and agency provision these offerings are in the 'functionalist', and were abandoning the 'liberal-productivism' mode.

²² Centre for Continuing Education Seminar, University of Canterbury, 3 November 1997.

Chapter Eight

The opening door: retraining women

We may well ask, indeed why is it that the world goes on supposing that all women are born housekeepers, just as all collies are born sheep dogs. Some like the work, and do it well; others detest it, but a woman has no choice. No distinctions are made. Society's decree has gone forth: "Take housekeeping as your life's work. If you do it ill or unwillingly, so much the worse for yourself. You shall have no other."

N.G., *Otago Witness*, 2 December, 1887

The present prolonged recession is giving rise to new and strident voices which proclaim that when jobs are scarce, women should not be competing for them. It is more important, they say, that the head of a household or a school leaver - both assumed to be male - should have work rather than women for whom, it is assumed, payment for work is a luxury. It is hoped that today's women will not be driven from the workforce and the institutions, like the university, which prepare them to take responsible positions in it, as their grandmothers and mothers before them were, in order that men might have job security and opportunities. I entirely reject that as an option in planning New Zealand's social and economic future.

Helen Clark, later Prime Minister,
in 1983, when she was a Member of Parliament

Earlier chapters have covered the wider context of the recent upsurge in retraining in New Zealand by investigating the changing world in which it is situated; the labour market and family patterns that have led to the new interest in retraining; and the history and nature of tertiary education in New Zealand. By taking a closer look at women, Chapter 8 helps explain why they have been the pioneers in the wider movement towards retraining. Perceptions of what was appropriate employment for women have affected both the policy and the provision of education for women in New Zealand. Growing numbers of women

seeking to re-enter the workforce signalled social change in the role of women, the nature of women's lives and the character of the work force. Retraining, which seemed at first to be a feature of the lives of married women, has extended into the lives of many adults.

The present chapter investigates the reasons for the early uptake of retraining by women. It first recapitulates the position of women in education and employment, including the post-war changes that led women to challenge their social position and to embrace retraining opportunities. This is then illustrated by a case study of the retraining courses offered at Christchurch Polytechnic. Just as women were pioneers in seeking education for occupational change so the Next Step Centre, where the case study is located, was where many women undertook education which, by providing new directions, changed their lives.¹ The Centre and the courses run there, like the women who attended, were at the forefront of social change. Therefore the case study of women's uptake of retraining and later entry into paid work provide a sensitive indicator of the changes which have occupied the last two chapters. Given that retraining is at the intersection of employment, education, and welfare policies, the study provides a rich indicator of changing government and societal attitudes and policy.

Education for women

From the first days of women's education in New Zealand, contradictions and ironies have been evident in the progress women have made towards equal educational opportunity. Equal educational opportunity has been a legislated right in that women have had, under the law, equal access to education at primary, secondary and tertiary level. What has not been equal is the actual access to educational participation, particularly in more recent times at tertiary level. The opportunities for women and girls have been limited by social, attitudinal and socio-economic barriers, in particular by attitudes to the employment of women. More recently as a result of political decision-making these barriers have been economic.

As we have seen, government measures in New Zealand have always treated women as equally worthy of education as men, although the legislative provision did not necessarily reflect the social reality. The differing valuing of women's and men's skills, as we saw in Chapter 4, was obvious to an observer like Sarah Saunders Page who could see that work was clearly divided into that which was appropriate for women and undervalued and that which was appropriate for men.

Is it any wonder that both boy and girl go out into the world with an indelible belief that woman's work is inferior to man's? (Page, [1911] in Lovell-Smith, 1992, p. 146)

This sentiment is echoed by the author of the following comments, who was aware that women were not being prepared for, nor would even have aspired to, the roles of university lecturer, parliamentarian, or Prime Minister that she has filled.

The predominant, if not the ideal, function of education systems has been to train people for their adult occupational roles. The adult occupational role prescribed for women has been a very narrow one. Consequently the education which women have received has been in keeping with their futures in the home with their families. Until the last quarter of the 19th century, Ann Oakley says, education for middle class women "consisted mainly of a training in feminine accomplishments provided by governesses at home. Girls' schools, where they existed, were geared chiefly to teaching the art of husband catching with a repertoire of superficial accomplishments: a smattering of foreign languages, singing, dancing, sewing, 'a preparation for a flirtatious courtship' - not, significantly for practical housewifery." If working class girls got any education at all, it was at it was at a "charity, dame, Sunday, or part-time factory school". Later as working class education expanded, those girls were educated for their future roles as wives and/or domestic servants [Oakley: 113-114]. The point is that women's formal education in the past has mirrored rather than determined their position in society. (Clark [1984], no page number)

Clark was, however, in quoting Anne Oakley referring to the situation in the United Kingdom. In the colony of New Zealand women joined men at university to study academic, not just domestic, subjects. In 1877 Kate Edgar became the first woman to gain a degree in New Zealand. The ceremony in 1885, at which Caroline Freeman of Otago University was capped as the university's first woman graduate, was called 'one of the great social advances of the century' in the *Otago Daily Times* of 28 August, 1885. At the ceremony, Dr William Brown, made a strong plea for education for women, whether they became wives and mothers or entered the professions. He paid tribute to the 'pluck and perseverance' of this graduand who was a worthy precursor to all those who followed, especially those taking the route of later entry as a mature student or retrainee.

Caroline Freeman had no secondary education at all. She was, in our terms, a 'mature student', a part-timer who put herself through university... She worked for matriculation while teaching and in 1878 enrolled for a Bachelor of Arts course as the first matriculated woman student at Otago University. It was not easy. Her father had recently died, but she still lived in the family home at Green Island and daily walked the seven miles home after lectures, a punishing regime when the university session ran for six consecutive months, over the winter, with only a brief break. (Page, 1992, p. 10)

Between 1885 and 1900, fifty-seven women followed Caroline Freeman in graduating from Otago University but it was taken for granted that marriage signalled an end to their paid employment (Page, 1992). This perhaps helps to explain why opposition to higher education for women was muted; only unmarried women would be seeking to enter the professions; educated women were not perceived as significant competition for men seeking employment.

The higher education of women had very promising beginnings in New Zealand. Women were first admitted to classes in 1871, shortly after the founding of the first university. The academic record of the early women students was magnificent. In the 1880s they took one-third of all the MAs granted in New Zealand. In 1905, one third of those qualifying as doctors or taking masters degrees were women. In 1910, we are told, "women made up more than half the graduating honours class, received all the firsts, more than half the seconds, and left men only a majority of the third class degrees." ! ... From 1900 - 1914, the percentage of women enrolled ranged from 30.8 to 39.3 per cent of all students. (Clark, [1984], no page number)

The enrolments of women during World War I, when they were approximately a third of the students, reflected not only the presence of women but also the absence of the men who were fighting overseas. When the men returned the social priorities became first, the position of the returned servicemen, and then those of the family unit; for four decades after the World War I the percentage of women among university students fell. The numbers of women rose in wartime when men were abroad in the armed services during World War II but fell again in the aftermath. The slow recovery in the numbers of women students after this was a reflection of the same pattern of priorities: men first. It was not until 1972 that the proportions were back to the same levels as before the First World War (Clark [1984]). Only at the end of the century did the percentage of undergraduate women again reach the 1918 levels.

The figures for women's attendance at universities are

closely connected with the vicissitudes of the women's movement; the doldrums of the 1920s to the early sixties were at the time of the backlash against feminist ideas, and then of the feminine mystique; the recent increase in the number of women at university is linked with the new feminism. (Hughes, 1978, p. 152)

Opportunities for women were thus present in higher education but the uptake was modified by current social attitudes of men, and of women themselves, to the idea of education as a right for women.

Women as dependents

The role of the state and the need for leadership shows up even more clearly in employment where discrimination was more deeply entrenched than in education. One of the earliest pieces of legislation, the *Employment of Females Act, 1873*, attempted to protect women and girls by limiting their hours of work although it proved unsuccessful because of the lack of adequate enforcement procedures (Wilson, 1984, p. 170). The *Industrial Conciliation and Arbitration Act* of 1894, which gave limited power to workers through the re-establishment of unions, did not treat women workers as individual adults. Even though there were women workers who were dependent on their own earnings, and often responsible also for the support of their children, women were regarded as dependents in the households of their husbands or fathers, regardless of whether they had husbands or fathers to be dependent on. Despite the granting of the vote to women in 1893, as workers they were not equal to men in the eyes of society or of the law. Aware of this situation, Christina Henderson in 1899 was one of the first in New Zealand to call for the training of women. In a report entitled 'Women's Industrial position in New Zealand' presented to a National Council of Women (N.C.W.) conference,

she described cases of young women who worked for no wages, such as pupil teachers and, especially, young dressmakers, who after working their first year without pay could be turned out at the whim of their employers. The plight of the dressmakers, the shop-assistants, and indeed the whole range of women's occupations, showed the same thing, that women's earnings fell far short of a 'living wage'. (Miller, 1979, p. 105)

Her concerns about the economic exploitation of women were shared by the National Council of Women, but not universally. In 1894 the advocacy by one of the women's political associations for "Equal wages for men and women, according to the value of the work and not of the sex of the worker" had been dismissed as, "A harmless resolution, based apparently upon economic ignorance" (Hargreaves & Hearn, 1986, p. 13). In 1900, at the Dunedin conference (of N.C.W.), Miss Henderson read a paper on the ethics of wage earning, concluding that in all cases where men and women were engaged in the same work an equal wage should be paid for that work. Again the Council passed a motion calling for equal pay but the Prime Minister's response when this was presented to him was to suggest lowering men's wages to equal those of women (Miller, 1979, p. 106).

It was to be sixty years before the law-makers of the land were to agree with Christina Henderson. In fact the opposing view, of men as breadwinners and women as dependents, was to be enshrined in law by the decision of the Arbitration Court of 1922. In arguing for

the 'family wage', the court was concerned with the situation of men and of their families and oblivious to the situation of any woman not living as the dependent of a male. The assumption was that every woman was living in a household where there was a male earner to help her supplement her inadequate wage by providing a roof over her head.

Up to the present we have been considering the right of the labourer to a wage adequate to a decent livelihood for himself as an individual [However] the great majority of men cannot live well balanced lives, cannot attain a reasonable degree of self-development outside of the married state. ... Outside of the family he cannot as a rule, command the degree of contentment, moral strength and moral safety which are necessary for reasonable and efficient living. ... Now the support of the family falls properly upon the husband and father, not upon the wife and mother ... his decent livelihood means a family livelihood ... he has a right to obtain such a livelihood as reasonable terms [sic] from the bounty of the earth. (Arbitration Court, 1922; quoted in Armstrong, 1992, p. 232)

This is a clear expression of the concept of the family as the basic economic unit in New Zealand. A degree of state intervention is espoused but this is limited. With women thus defined as dependents, equality of opportunity for women was far in the distance. There were many steps to be taken first, including the welfare legislation that was passed in the 1930s. The Arbitration Court judgement established as fundamental the principle of the state taking responsibility for its citizens' welfare and set the basic pattern for the next fifty years. Allied to this was the creation of a regulated, protected economy and these measures together combine to form what Bruce Jesson has usefully termed the 'historic concession', with the key to this compromise being the role of the state.

The historic compromise refers basically to the political reforms of the 1930s, whereby the first Labour Government established a regulated and protected economy, and the welfare state. This amounted to a compromise between the business community and the working class, with the business community losing much of their freedom of action, and with Labour - the working-class party - moderating its goal of socialism. (Jesson, 1989, p. 9)

Policy positions in education, employment and welfare were now established and were only modified gradually over the next few decades. There was little change in the status of women. Working class women continued to work in low-paid, insecure jobs and women seeking secure, continuous employment or careers met many obstacles. During the Depression of the 1930s women were discriminated against in employment (Sutch, 1964, p. 12). For example, on marriage a woman teacher was required to give up her job which meant that she moved again into the position of economic dependency. For the duration of each World War women were admitted to the Public Service on the same basis as men but

in times of unemployment they were not only paid lower rates but were barred from promotion by being appointed as temporary staff (Miller, 1979, p. 106). Again women fared better in potential educational opportunity than in employment practice.

The Second World War has been regarded as an opportunity for women to improve their employment prospects by filling jobs vacated by men who had entered the armed forces. It has been “often depicted as a turning point, bringing women into non-traditional jobs in unprecedented numbers” (Brookes, McDonald & Tennant, 1992, p. 9). While that may have been the case in other countries, in New Zealand the reality was that

man-powering brought few new opportunities to women. Female labour was mainly required in poorly-paid, low status occupations that had traditionally employed women. Indeed the purpose of man-power control was to secure a labour force for unattractive, but nevertheless essential, areas of employment. Equality for women would be some time coming. (Montgomerie, 1992, p. 204)

As the men returned to civilian life, women returned to the home, re-affirmed as the proper place for married women. There was some acceptance of women in the paid workforce, usually on the understanding that they were there until they were married or because they had not reached this proper state for women.

The *Minimum Wage Act* of 1945 still discriminated, by providing for different wage rates but not, this time, on the basis of the male breadwinner concept (Miller, 1979, p. 106). It was not that men and women were henceforth to be paid equally for doing the same work; it merely meant that the reasons advanced for women’s lesser rate of pay were modified. Instead of the discrimination being based on position in the family, and as a consequence of women’s inferiority as workers, it was now regarded only as the result of the latter.

In the 1950s, at a time when international organisations such as the I. L. O. (International Labour Organisation) were advocating equal pay, a test case brought by women in the Public Service Association put the spotlight on the discrimination experienced by women. In 1957 the Council for Equal Pay and Opportunity was established to fight for equal pay for women with men. Contributing to this acknowledgment of the need for change were, no doubt, the movement of women into the workforce and the erosion of the idea of the male provider. There was to be a great deal of agitation on both sides before this work of ensuring equal pay for men and women who were performing the same jobs came to fruition with the introduction of equal pay, first in the public sector with the *Government Service Equal Pay Act*, 1960, and then in the private sector (1972).

Challenges to the status quo

It is in the policies of the last four decades that the concerns of women seeking employment and retraining have been addressed and a clear division between different approaches to women retraining and the ideologies behind these approaches becomes manifest. Until this time the concerns of women seeking education which would enable them to re-enter the paid workforce had not been considered. Educational opportunities might have been available but women were still inhibited from making full use of them by perceptions of what was appropriate. Bridging courses were needed to support them in the period until they had the confidence to join the educational mainstream in numbers commensurate with men's participation.

Before this could happen, it was necessary for the traditional role of women as dependents to be challenged and perceptions relating to their fitness to be independent earners to be addressed. Certainly women had been employed and had supported themselves and their dependents, but those who did so before this time had been regarded as anomalies and little in the way of policy had been directed at their position. Primarily women had been expected to be housewives. For those who entered the paid workforce, options had been limited. Sixty-five percent of those who were in paid employment in 1966 were, according to the census that year, in only seven occupational groups.² Signs of change were occurring: the proportion of females aged between 15 - 65 years in paid employment as a percentage of all females of this age group, had increased between 1956 and 1966 from 27.7 percent to 30.9 percent. In the same period the percentage of married women in paid employment had increased between 1956 and 1966 from 16.0 percent to 19.9 percent. Similarly, married women as a percentage of the female labour force had moved from 37.6 percent to 41.5 percent.³

As the proportion of women in the work force increased, other signs of change occurred, most of them echoing the changes in the perceptions of women's and women's potential, which were also affecting women elsewhere. The correlation between the increasing numbers of women in or seeking paid work with the rise of the second wave of the feminist movement, and the desire of increasing numbers of women to be seen and treated as individuals, rather than as wives or daughters, was clear.

The debate over whether married women should be in the workforce is articulated by the comments of Lesla Kennedy, in a talk to the Waikato Branch of the Society for Research on Women in 1968.

The increased standard of living of many New Zealand families has come increasingly to depend on the ability of women to manage both home making and paid work activities. Women have contributed significantly to the rise in the family income and because they constitute approximately a third of the labour force they serve themselves as a stimulus to the demand for manufactured goods, eg home appliances etc. What then of the future? Will this present trend continue so that a majority of married women will feel they *ought* to work? (Kennedy, 1969, p. 25; emphasis in the original)

Why were married women re-entering employment? The reasons given were various: the influence of employment during the war years; the high birthrate of the post war years which meant that women were actively encouraged to enter, for example, teaching; the increasing levels of education undertaken by girls; smaller sized families made possible by better forms of birth control; the personal satisfaction women found in paid employment; and the changes in the social structure of marriage which sometimes made employment an economic necessity (Kennedy, 1969). For some women there was no choice as welfare policies failed to provide adequately for a family without a 'bread winner'. The Domestic Purposes Benefit was still in the future and, as rates of separation and divorce began to increase, women were forced to seek employment no matter how poorly paid (N.C.W., 1974).

Unemployment was low and there was a perceived need for more workers in the New Zealand labour force with two possible responses: women or immigration. Women were still seen as a reserve labour force, those who can be encouraged into the paid workforce when there is a need for them. Women's chances of re-entering the labour market could depend on decisions about and the impact of immigration policy. Kennedy, a Vocational Guidance officer, suggested that "if the predicted immigration gains are not reached then 'the resource pool' of the unemployed married women in the community could again be in demand" and raised the possibility of providing education and retraining for women.

Other than this possibility however, it would seem that women who wish to ensure their future ability to participate will need to pay attention to the growing importance of professional and skilled occupations which introduces for discussion *the need for retraining programmes, vocational training and higher levels of education.* (Kennedy, 1969, p. 27; emphasis added)

The 'unemployed married women' referred to needed skills training because generally they had worked in the paid workforce only briefly before marriage and motherhood had turned them into unpaid workers. Those who saw women as an expendable part of the employment

scheme would expect their involvement to be a temporary measure. They assumed that women would return to domestic duties when the demand eased.

This view ignores the “social phenomenon that is almost a revolution, namely the long period of years when a woman is not engaged in bearing and rearing children” (Sutch, 1964, p. 3). Women’s life expectancy had risen (since the 1890s by 17 years), women had fewer children and had them at a younger age meaning that when her last child started school, a woman had 40 years, the majority of her life ahead of her. The workforce needed workers with skills; there was an opportunity here for women. In an address on women’s changing role, Dr W.B. Sutch, then the Secretary for Industries and Commerce,⁴ was clear that:

Immigration cannot provide the skills we need, though immigration is important. It is from ourselves that the quantity and quality of skills must come and in contributing these skills we must realise that there are two groups in the community which have not heretofore contributed what their potentialities would warrant - namely the Maori people and women.

Since the last war and particularly in the last decade these two groups have added considerably to the workforce; in the last five years, for example, the female workforce has grown at more than twice the rate of the male work force. But although the number of women workers has increased, the range of skills they have contributed has not risen much.

Part of the reason for this has been the traditional attitude in New Zealand towards the education of women. As a result we have been considerably neglecting the economic potentialities of half our population, be they parents, customers or workers. ... The education of girls is deficient. It is also too short. The Education Department statistics of the destinations of school leavers show that girls go on to a narrow range of occupations, a small percentage of which require extensive training.⁵ (Sutch, 1964, pp. 2-3)

This under-participation of women and girls in education and employment would be remedied very gradually. The consequences of women having missed out on education meant that they would seek second chance opportunities and retraining, for several decades. It was retraining that Sutch now called for, referring to training programmes for women developed overseas.

For re-entry into employment there is positive work to be done immediately: first to find out the best way in New Zealand of advising re-entrants in the opportunities for work and the kinds of training needed; second to provide the training. (Sutch, 1964, p. 30)

Sutch and Kennedy must be among the first in New Zealand to have considered the need for retraining courses to be provided for women. Government intervention in the employment scene was regarded as appropriate, education was a public good and women were being seen by those who were social progressives⁶ as potentially contributing more to the economy.

Retraining, in the sense of further education and training for occupational change would provide what was required. All the relevant theories of social policy and the position of women appeared to have come together. How long would it take for it to happen in practice?

The first steps

A significant step in this direction was the establishment in 1967 of the National Advisory Council on the Employment of Women (N.A.C.E.W.), set up by the Minister of Labour, with the aim of creating “the conditions for women to make their full contribution to the national economy consistent with their individual freedom, and their responsibility as wives and mothers” (Hansen, 1987, p. 5). The Council, which succeeded the Council for Equal Pay and Opportunity, was to give advice to the Minister with the initial emphasis on areas of traditional employment of women and fact-finding for future policy suggestions to government. Concern was expressed about maintaining ‘proper social safeguards’ so that women could continue to discharge their family responsibilities (Hansen, 1987, p. 5).

Pre-employment training for women returners was an early concern of the Council and it welcomed the establishment of the first course of this kind at Wellington Polytechnic in 1969. The course was concerned with updating women seeking to return to office work, a non-controversial area in that it was clearly at this time one where only women were employed. The first move had been made.

Attempts were made from the late 1960s to help women return to the paid workforce after they had taken time out to raise a family. In 1967 Wellington Polytechnic began special secretarial courses for women wanting to return to paid employment. In 1973 Christchurch Polytechnic began more general courses aimed at helping women return to work. These six week ‘new outlook’ courses became the model for courses offered at other polytechnics⁷. By the 1980s most technical institutes had introduced similar courses, and - just as important - were providing child-care facilities for students with pre-school children. (Dougherty, 1999, p. 43)

In 1968 the Vocational Training Council had been established to co-ordinate and promote the many training programmes available, to identify deficiencies in training, and to help in repairing these deficiencies. As the work developed, the Council became more aware of the special problems faced by women in employment and in 1974 a Women’s Advisory Officer was appointed to look at the special needs of women’s training. Women’s opportunities for employment, and promotion to responsible positions were limited by stereotypes.⁸ Other barriers limiting their access to (re)training opportunities, especially for those with family

responsibilities, were that: formal training was available only for full-time students; some courses required a student to have a 'suitable' job before enrolling; the special courses for women were limited in scope and 'did little to open up training opportunities'; the Technical Correspondence Institute was available only to those in employment; and above all, there was a lack of adequate financial assistance.

Most courses charge a small fee; there is the cost of books, travel, and equipment. These expenses, to a woman without an income of her own, can be prohibitive. Lack of child-care facilities may also prevent many women from taking formal training. (Meikle, 1976, p. 59)

At a United Women's Convention 1975 workshop on 'Women in Training' the emphasis was on 'the problems facing women returning to work'⁹ which was seen as reflecting 'the area of greatest discrimination and need'.

A questionnaire which participants completed revealed that in general the main problems were lack of information, lack of confidence, and the need for vocational guidance and financial assistance. Most women had higher aspirations than their current level of employment...

It was agreed that only through training can women achieve equality of opportunity in the workplace. They must have increased access to all forms of training programmes, both in training institutions and those provided by employers. The workshop found that the report of the Select Committee on Women's Rights, *The Role of Women in New Zealand Society* (1975), provided a valuable starting point and wanted prompt action on the sections relating to training. (Meikle, 1976, p. 87)

During the 1970s there was great interest in analysing, sharing information and researching the lives of women. The N.C.W. report, *What Price Equality?* suggested that if there were problems facing a young worker these were much worse for the married women returning to work. At that time the average break due to maternity averaged 10-12 years, so that most women would have 30 years available for a career after their last child started school (1974, pp. 38-9).

Most women will have lost quite a bit of confidence in their ability to cope with the job they previously tackled with ease, and their situation is made worse if there have been many changes in the work while they have been at home. Some polytechnics and voluntary organisations run courses designed to help restore confidence and brush up rusty skills (especially in commercial subjects) and the shortage of teachers and nurses forced the authorities into belatedly providing re-training courses for them. But for the majority of women, little seems available - they don't know where to look or apply and they often end up taking the first job that is offering, whether or not their dormant skill and capability entitles them to something better. (N.C.W., 1974, p. 39)

The same concerns were expressed in the 1976 Federation of University Women study, *Women at Home*, along with the comment that: "Whether we like it or not, more and more

married women are undertaking paid employment” (p. 63). Official figures showed that the proportion had risen from 17.5 percent in 1945 to 38.5 percent in 1961 and 50.5 percent in 1971. This was attributed to increased work opportunities, women having more time after their children had “passed the most demanding stage”, financial demands and social reasons. The need for confidence building and retraining was recognised.

There is a danger that women going back to work may underestimate their own abilities and take on work below their own capabilities. This may often be because they lack confidence after years spent at home in the company of young children. There may be areas where employment opportunities are so limited that women have to take whatever work is available, but in many places there is some choice and women owe it to themselves to aim high and not be satisfied with dull routine work or work that is not suitable. Schemes for re-training women returning to work have not developed as far in New Zealand as they have in some other countries, e.g. Australia, U.S.A. or Britain, but the need has been recognised and some Technical Institutes run special courses and programmes. The Department of Labour has produced a series of leaflets entitled *Employment? Responsibilities, Training, Unions, Costs, Legal Requirements*, which give answers to some of the questions facing women returning to work. (F.U.W., 1976, p. 63)

In particular, International Women’s Year, 1975, saw a number of research reports and publications which surveyed the place of women in society and many of these addressed the value of education for girls and retraining for women. In 1972 a predecessor of such studies, *Urban Women*, by the Society for Research on Women (S.R.O.W.) had asked all the respondents, except schoolgirls, about whether they would consider attending a refresher course for their present or previous occupation. Thirty-eight percent said they would, 48 percent would not and 8 percent said that there was no such appropriate course. That 58 percent had no educational qualification showed the need for retraining if these women were to make a contribution to the economy and obtain satisfactory employment (1972, p. 128). The 1973 S.R.O.W. study *Why Employ Women?* reported that there were refresher courses for nurses and teachers, and some technical institutes ran courses for older women, particularly in office work. There was a need for more such courses as many women were working at less than their capacity (Bullock, 1973, p. 18). Similar themes were expressed in the report of the Select Committee on Women’s Rights (1975), which recommended to the Government that:

The Department of Education and the Department of Labour adopt an active policy of disseminating information about existing facilities and new developments for continuing education, and of counselling, encouraging, and referring women in respect of the opportunities that are or may become available for gaining educational and training qualifications, particularly as relevant to fields of employment; and a programme to give effect to this policy be devised and implemented in consultation

with the Vocational Training Council. (Select Committee on Women's Rights, 1975, p. 64).

The *Women at Home* study (F.U.W., 1976) asked women why they had returned to (paid) work. The respondents offered both social and financial reasons, including in the latter the widening gap between the one and two-income family and the erosion by inflation of the Family Benefit. The comment from the study's authors mentioned the value of the work done by women at home who could save money by making her own and her children's clothes, growing vegetables and by home baking and cooking. Despite the value they ascribe to these activities they suggested:

Social pressure to work is often more difficult to define and to resist. A woman in town may find that practically all the women in her street are working: they talk about the job instead of discussing the progress of the children; she feels 'out of it', her confidence dwindles - and to cap it all off she often is expected to look after the children of working mothers when school is over. She is inclined to feel that being a housewife and mother is neither as exciting nor rewarding as a paid job, and of less value to the community. Recent legislation such as the Accident Compensation Act and Superannuation Act have reinforced this feeling by denying their benefits to housewives. (F.U.W., 1976, p. 64)

The authors clearly express their concern for these women at home, a concern shared by N.G., writing almost a century earlier in the quotation which opens this chapter. This author's comment also suggested that all women might not all be suited to the role of housekeeper and society's decree that all women should be housekeepers might be challenged, a view that increasing numbers of women were finding it possible to voice.

Another study undertaken by members of the Society for Research on Women, *Career, Marriage and Family*, provided information about the kinds of training available to Wellington women, as well as about the numbers of those who had undertaken training or wanted to do so (S.R.O.W., 1976). Such studies of the position of women in New Zealand society were undertaken voluntarily by members, usually as a result of their own experiences of what women needed. Both the initial impulse for the study and the resulting publication thus highlight the perceived need for retraining.

Countering the opposition

The more 'positive' approach as called for by Sutch, is presented also in the report of the Vocational Training Council (V.T.C.), *Women back to Work: Guidelines for Employers on Women Returning to Work* (Women's Advisory Committee, 1976).¹⁰ This tackled the problems of women returners by challenging employers to consider their needs. For once

the conflicts inherent in their situation as returning workers were not regarded as solely the responsibility of the women to solve. The guidelines acknowledged the “common problems” faced by women returning to the workforce and the increased demand for retraining opportunities which were seen as reflecting “the shared problems of loss of confidence, the need to brush up on old skills and often the desire to train for a completely new career” (p. 3). The advice for employers was presented in sections relating to recruitment, selection, induction, training and development and the instructor. It acknowledged that “married women are employed in jobs of even lower skill and responsibility than are women generally” (p. 3) and suggested that special recruitment procedures might be needed to encourage women who might be unsure of their own ability. Selection procedures should take into account the differing nature of adults’ needs and experiences, including that their last work experience might have been “five or even 20 years ago”, that they might be wanting to start a completely new job and that they might be inhibited by lack of confidence and fear of interviews and tests.

The section on retraining in the V.T.C. report stressed the benefits for employers and noted that assumptions about re-entry women might limit the women’s training and development opportunities.

1. It is often felt that women’s commitment to the job is weak and that investment in training may not bear returns.
2. Difficulties in the past may have discouraged employers from teaching adults new skills.

However, research shows that today many re-entry women have a very strong commitment to work and the demand for training opportunities is very high. This is a natural reaction, particularly when re-entry women intend to resume or establish a new career, and can, in many cases, continue working for 20 or more years. Initially on their return to work, many women are employed on a part-time basis, and therefore are not considered as long-term employees. However, many women would like their part-time work to expand to full-time with the same organisation, once their domestic circumstances enable them to resume full-time employment again. In such cases the part-time work could be regarded as a ‘bridging’ period during which full-time training and development opportunities can be provided in anticipation of a full-time role later, possibly in a position of greater skill or responsibility than can normally be provided on a part-time basis. There is an obvious economic advantage to be gained in this approach. (Women’s Advisory Committee, 1976, p. 12)

With the calls for retraining programmes and some limited response in the provision of these, the situation of married women who wished to return to the paid workforce had achieved some recognition. Some government intervention was seen as acceptable. There were still, however, difficulties for women who needed to have childcare provided for them

to be able to work in paid employment. This was hard to find and few women could embark on a training course or employment feeling secure about the care of their children (F.U.W., 1976). Working part-time was a less well paid but more manageable option for those with preschoolers or school-aged children. Part-time jobs were also easier to find than full-time work but they lacked security and did not provide a living wage; so the situation of women who were heads of families was especially precarious. And there was still opposition to women seeking careers and even to their seeking the retraining which might lead to employment.

The N.C.W. report sums up the situation in the 1970s soberly, alerting the reader to the strength of entrenched attitudes.

The changes that are taking place in family life in the seventies are disturbing to many. They are really still consequences of the original great change caused by the Industrial Revolution, when the family as a working unit was split in half. No longer had every member his (*sic*) appointed and necessary task within the family group; the father as the breadwinner moved outside the home, and although at first mothers did this too (not to mention the children), for many people the situation finally resolved itself into one where the father worked outside and the mother looked after the family's domestic needs. This was never true for all sections of society, but it has come to seem the norm to some, who have usually been articulate, outspoken and in positions of power. The present sense of dissatisfaction among women has been caused by the relatively sudden emergence of the other view point - that although most work is now done outside the home, it can still be done by both partners in a marriage, and the wife need no longer be limited to the domestic sphere. This is resisted by many men who think of a wife at home as a kind of status symbol showing their ability to provide for her and their children. It is also resisted by many women, for long conditioned to regard the domestic role as the ideal, and who feel that working women are either unfortunate (if they have to work from necessity) or (if they work from choice) unfeminine or even downright wicked. Those who are happily situated themselves cannot always see the difficulties or sympathise with the aspirations of others. It is the aim of this book to encourage all women, whether or not they are satisfied with their own conditions, to think seriously and constructively about these great social changes, and help mould a future that will bring the opportunity to lead a full and satisfying life to all men and women equally. (1974, pp. 72-73)

This was the context for the development of courses and programmes like those in the following case study. The study of the establishment of the *New Outlook* and related courses at Christchurch Polytechnic is the story of the changing lives of women in a New Zealand city from the 1970s onwards. Through the women's continuing enrolment and the increasingly vocational nature of the courses, the study reveals the changes taking place in women's lives. The changes in the courses reflect the changing interaction between the worlds of paid and unpaid work over the last three decades. Because the courses took place

at a state tertiary institution, the study also illustrates the complex interaction between ideology, government policy, institutional action and the consequent effects on the lives of individuals.

The Next Step Centre, a case study of courses for women

Stop the world; I want to get on

I could see my whole life disappearing down the kitchen sink.
Gillane (who after the *New Outlook* course became a university student)

I feel as though I'm standing on a railway station trying to decide which train to catch.
Mary (who became involved in volunteering and community education)

It's brilliant. I wanted to come tonight to repay some of what the course did for me. Updating Skills meant putting an excellent CV that got me interviews, the terrifying practice interviews and the demystifying of the computer. Clare (employed, after attending an *Updating Skills for Employment* course, as a health centre receptionist)

In determining their place in the world of work, particularly the world of paid employment, people of all kinds are dependent not only on what skills they have but also on the demand for such skills in the workplace. More subtly, but significantly, they depend on the ideologies which lie behind the structure of the labour market (Research Advisory Group of NACEW, 1990, p. 25) and their place in it. Perceptions of the value and place of work affect opportunities for those who are job seeking. Their chances of being employed are affected not only by what positions are available but also by perceptions about what sort of employment, if any, is appropriate for them. These perceptions may be the result of ideas held generally by society, or they may be the ideology of an influential group, or they may be enshrined in government policy.

The story of the *New Outlook* course begins in the early 1970s and continues with the expansion of courses at the end of that decade, the establishment of *The Next Step Centre for Women* and the *Updating Skills for Employment* course in the mid 1980s, and in its current situation reflects the situation of women seeking education and training in a 'user-pays' society. This story is mainly the story of Pakeha women,¹¹ although a few Maori women have attended the course, mostly in more recent years.

The impetus for the courses came from the women's movement of the 1960s, the post war feminism which questioned the necessity for women to conform to traditional roles as housewives and homemakers, and the changes of the 1970s already discussed. In the United

States Betty Friedan called this confinement to domestic life 'the problem which has no name'. This 'second wave feminism' was at first essentially a middle class movement strongest among women who, despite being comparatively well educated, found their lives constricted by lack of opportunities for meaningful activity outside the home. While in New Zealand those who spoke up most strongly were well-educated and were subject to the constraints of a small conservative society, the close-knit nature of the society also meant that many women isolated in the fast-growing suburbs learnt of these changes. The unattractive and misleading term 'suburban neurosis' did at least recognise the trapped nature of the lives of many women, and women's organisations began to call for the equal pay for equal work, wider employment opportunities for women, and training opportunities (S.R.O.W., 1969). The first such training course appears to be that set up at Wellington Polytechnic in 1969 (Hansen, 1987, p. 5).

In Christchurch the initiative for a retraining course came from a meeting of the newly formed National Organisation of Women which, among its resolutions on employment, called on the government "to set up under the Labour Department, a Women's Bureau (as in Australia and the USA) to give a counselling and advisory service, and to initiate courses for women re-entering employment who would, if necessary, be paid while undertaking approved training courses" (N.O.W., 1972).

The New Outlook courses which began at Christchurch Polytechnic (then Christchurch Technical Institute) in 1973 were based on the model of those at Hatfield Polytechnic in the United Kingdom rather than that used for the Australian and American courses. The courses in the United States for 'Displaced Homemakers', a group somewhat similar to Domestic Purpose Beneficiaries in New Zealand, aimed to train them to become employable and self-supporting. The British courses were also aimed at encouraging women in re-entering the paid workforce. They ran part-time, one day a week, with their target group being women who were well-educated but had left employment for domestic tasks.

Significantly the local courses were part-time and even more importantly they focused on providing general interest topics rather than strictly vocational ones. The reforming zeal of N.O.W seems to have been moderated, perhaps by the conservatism of the Technical Institute (which was however being comparatively innovative in agreeing to offer such a course at an institution which primarily provided trade training), or perhaps by the setting of a New Zealand city where women were not as ready as in Melbourne, or New York, or London to seek full-time training and work. Although the initial brochure quoted Virginia

Woolf: “Women have served all these centuries as looking-glasses possessing the magic and delicious power of reflecting the figure of man at twice its natural size”, the feminist ideology that prompted the initiative was thus modified in practice from the start. The participants were offered a ‘new outlook’ and whether this translated into a move into the paid workforce was an individual response.

The first courses

Six courses were held the first year, 1972, setting a pattern of two courses a term, a pattern which has largely survived although the cost of \$5.00 soon increased. The form the course finally took was the one it still retains: three days a week, Tuesday, Wednesday, Thursday, 9.30 am to 2.00 pm, for six weeks, hours that were regarded as ideal for women with domestic commitments, because the woman’s activity and retraining would not conflict with her care of school-age children nor require any compensatory effort from her husband. (In those times ‘husbands’, not ‘partners’, were the other adults in the house.) Brochures advertising the course noted that “these hours may present difficulties for some women but one of the aims of the course is to encourage women to tackle such problems”.

In the plan for the first course English and ‘New Maths and the Metric System’ were timetabled for each morning showing that the course was envisaged as having a remedial aspect, unlike its antecedent in the United Kingdom which was targeted at returning tertiary educated women to the workforce. Other sections of the course focused on career opportunities with speakers from Vocational Guidance for example, and the one speaker who visited the course consistently for twenty years, Graham Carrington, the Liaison Officer for the Polytechnic, who outlined the opportunities for further education and training.

A panel of ‘working mothers’ outlined to the participants how to combine paid employment and care of a family. The use of the phrase ‘working mothers’ reveals that the status of these women was seen as primarily a domestic one which was supplemented by work outside the home. This local perception is reinforced by the statements of the National Advisory Council on the Employment of Women about the same time¹² (Hansen, 1987, p. 5) and by a handout given to course members. Entitled ‘Handy Hints and Tips for Working Wives and Mothers’, it advised women how to hold paid jobs without inconveniencing their families. The advice included:

Make your day sound fun when telling the family (if they are wanting to know) of your day to day experiences.

Mending All members of the family to leave in the appointed place so that ‘Mum’

can 'go to it' whenever she chooses; shouldn't have to chase around for things.
Buy meat once a week Plan ahead. Ask each member of the family to plan a dinner (their favourite) or dish so you can order the right things. Maybe junior wants sabs / jelly - so what.

In contrast to the discussions on organisation of a household in more recent years, there is no mention of other members of the household taking responsibility for aspects of family life.

The first participants

It is significant that, in contrast to later participants, most of the women who attended the course in its early years were married with school-age children. It was usual for them to have been out of the paid workforce for ten to fifteen years. While full information on those attending in the early seventies is not available, the range of participants was wide both in age (most were in their thirties and forties but the oldest were aged seventy plus) and in socio-economic status. Most had three years' secondary schooling or less but this was usual for women in the age cohorts represented and there were some women with tertiary qualifications such as teacher training, nursing or university degrees.

Two researchers employed in 1983 under the Project Employment Scheme examined the enrolment information on those attending the course from 1976 to 1982. They found that of the 571 women enrolled during that period 66 percent (375) were currently married, 17 percent separated or divorced, 6 percent widowed, 5 percent single and 6 percent did not supply information about their marital status. The median age was 30-40 years, with over 50 percent in the 30-50 age group. Over half had left school without any formal qualification. And while the number of those with or without children is not known, 70 percent had one or more children at home at the time they attended the course (Manthei, 1993).

Each woman starting the course (then as now) filled in a personal information sheet which provided the tutors with an idea of the range of interests and life experiences of the class members. In the early years of the course this asked not only about marital status but also husband's occupation which was supplied without question.¹³ Information was therefore available about the socio-economic status of the partners of the course participants although not necessarily about that of the women themselves. In the early eighties, however, the tutors omitted the question about husband's occupation from the form, seeing it as inappropriate in a course which was asking the women to focus on themselves as individuals

and not as members of families or their husbands' wives. This means, unfortunately, there are difficulties in making cross-decade comparisons about socio-economic status.

The most commonly held jobs over most years of the course have been domestic or other cleaning, or part-time clerical, or retail positions, even among those with tertiary qualifications. That women take jobs that fit with their family commitments rather than positions which suit them is illustrated by the cases of qualified and skilled women who listed menial, badly paid jobs when recording their work history. Education is thus also an unreliable indicator of lifestyle, aspirations, or ability. Almost all the women could be described as under-educated in terms of their potential for learning.

The most substantial gain for many women was, not surprisingly therefore, a gain in confidence, a new or renewed belief in themselves. For the tutors this was an affirmation of their belief that the lip service paid at the time to the importance of the work done by women working at home bringing up children was not translated into any meaningful recognition by society of the worth of this work.

Door opening

At the end of the six weeks the women evaluated the course and its effect on them, both verbally and formally in writing. The responses were almost uniformly that it had been a 'door opening' experience which had shown them new opportunities¹⁴ and given them a 'new outlook'. These assertions were supported by the number of women who chose to follow up on each of the options that had been presented to them during the course: voluntary work, further education or employment. A minority chose none of these, like the woman who commented after attending a course in the winter that she was now ready to start tennis again, but even these women commented on the value of the course in providing new experiences and enhancing their self-esteem. Typical comments were "I've realised there are lots of others just like me", and

It absolutely broadened my horizons. Before the course I never had enough confidence to voice my opinion. Recently I went to a meeting and for the first time I stood up and said what I felt. People listened to me and took note of my opinions. (Price, 1981, p. 23)

Later, those who opted for working voluntarily in the community usually combined this with further courses and used it as a route to paid employment, but in the seventies women chose voluntary work as an option in itself. Further education for most women who chose

to do this in the seventies and early eighties meant either taking part in the follow-up courses or enrolling at the University of Canterbury in the *Liberal Studies Certificate*. *Liberal Studies* was a pre-degree level programme which included university experience through some degree subjects, many of them modified for mature students. The polytechnic and the university courses complemented each other and visiting the university became an integral part of the *New Outlook* course. Each year a number of women moved on to the certificate, having gained the knowledge and confidence to do so.

Most of these women gained further confidence from attending the *New Start* course offered at Canterbury University which offered an introduction to degree study, by providing a orientation course which included study skills and experience of attending lectures and writing essays. Within adult education departments of universities, '*New Start*' programmes designed to provide encouragement and support for adults considering university study, were offered as were other certificate programmes which also provided extension education (Tobias, 1997). These courses performed a valuable role in enabling mature women to enter university under the provisions for open entry for those over twenty years of age. Like that offered at Auckland University, the University of Canterbury *New Start* programme provided an opportunity but there was still only limited recognition of the extra support services which made a difference to mature women students.

Particular attention needs to be given to the needs of mature women students who have been courageous in taking up their education again alongside others many years their junior. The "*New Start*" programme gets them launched, but it is worth considering whether extra resources might not be devoted to providing them with support services in the under-graduate years. Such services might include extra tutoring, co-ordination of regular support groups, and the extension of the present creche to a full day-care service. (Clark [1984], no page number)

'*New Outlook*' and '*New Start*' programmes began to address the problems facing women seeking retraining but other support was also needed and this was slow in coming. Opting for part-time work could be less demanding in practical and emotional terms than undertaking upskilling in the hopes of embarking on a career.

An article in the *New Zealand Women's Weekly* referred to a survey done by one of the tutors after the course had been running for two years. According to this,

for two years, the Polytechnic concentrated on teaching employment related skills such as typing, shorthand, and using a PABX switchboard, while at the same time building up their self-confidence (but) ... a survey found that of all the women who had been through the courses less than half had found a job. (Price, 1981, p. 23)

Looking back it is possible to regard the decision to concentrate on more general topics and skills as appropriate but it is necessary to interpret this finding about the numbers gaining employment in social rather than individual terms. The low percentage indeed reflects that the fact that only some of the women attending the course at this time saw it as a step into employment, but those who did want to enter paid employment were able to move directly into the workforce. At this time very little in the way of retraining was required by those re-entering paid work. Credentialism, in other words, had not yet taken hold.

In writing about the workforce in 1977 it was possible for William Renwick, Director General of Education, to say:

Nor is there yet the same emphasis on the possession of formal educational or training credentials in the New Zealand labour market as there is in the other countries with which New Zealand is usually compared. This has two important consequences. It means that individuals, by taking action short of having to go back to school or college, can move from one employer to another, or out of unemployment into a different kind of job. Personal qualities, a satisfactory work record, and a preparedness to show willingness, remain, as they have always been, critical factors in the employment prospects of those at risk. It means, too, that inequalities between people of the older and younger generations have not been forced into the open in New Zealand as elsewhere. People under the age of thirty are better qualified academically and in terms of vocational credentials than those over thirty. Because, however, possession of relevant credentials is not the only thing employers are looking for, older workers are not finding themselves so seriously at a disadvantage in the labour market as to make them feel as a group, a denial of rights through lack of opportunity. (Renwick, 1986, p. 33)

Most married women worked in part-time jobs and did not aspire to career positions. Opportunities for interesting work were limited for women because of the prevailing beliefs about the incompatibility of careers for women and the demands of family life. Retraining was limited throughout the country to confidence building and a smattering of the skills required in traditional female jobs.

The co-existence of the pressures for change and for the maintenance of the status quo are neatly illustrated in the 1977 *New Outlook* brochure which describes the course as “a programme for housewives” alongside the lines from the feminist theme song: “If I have to, I can do anything - I am strong I am invincible, I am woman.” The juxtaposition of these views of women can be explained by noting that the social attitudes and awareness of the organisers and course tutors differed from those of most of the course members. Long before women coming on the course identified themselves as feminists, the tutors did so, and staff attitudes to such issues as single parenthood, adoption, abortion and lesbianism

were accepting of diversity in these areas at a time when most of the participants were more socially conservative. It is thus necessary to note a distinction when talking about attitudes associated with the *New Outlook* course at a particular time and be clear about whether the ideas and beliefs being referred to are those of the shapers of the programme or the consumers. The former were often near the forefront of social change while the attitudes of the latter group covered a wide spectrum, from radical to (more often) conservative.

Expansion and change

1975, International Women's Year, provided a focus on the changing role of women not only through the Government *Report on the Role of Women in New Zealand Society* (1975) but also because many women's organisations were motivated to study the position of women and ways in which it could be improved (N.C.W., 1974; F.U.W., 1976). Childcare was an important issue, indicating that there was a progression from the view that women with school-age children should be able to hold part-time jobs (but not women with younger children, nor full-time jobs), to a questioning of the belief that women with pre-schoolers should care for them full-time. The absence of childcare had been a problem for women wanting to attend the *New Outlook* course which the establishment of a childcare centre at Christchurch Polytechnic, the first at a tertiary institution, helped solve (Furey, 1980)¹⁵. Before this, women who attended courses had been able to find such care only through informal arrangements with relatives and friends, or, in the case of courses held away from the main site, through the creches which were being established by community centres.

The late seventies were a time of expansion in education, particularly in community education, and this commitment in the community fitted well with what women wanted. The demand was for courses which offered New Zealanders the chance to expand their horizons. The growth in community education was exemplified by the kind of courses offered by the WEA, courses which ranged from hobby ones to those which revealed, examined, or even questioned aspects of New Zealand life.

Although Christchurch Polytechnic was constrained by the system of course approvals which meant that any new course had to be referred to the Department of Education in Wellington, courses were run in suburban areas, e.g. at Bishopdale Community Centre from 1976, and a range of spin-off courses were arranged to follow through on topics which had been touched on in the course. Some of these were 'self-help' classes organized by group leaders, reflecting the interest in communal activities which was prevalent at this time. By

1980 these extension classes included a number of general interest courses, on topics which related to women's desires to learn more about the society in which they lived, and some which concerned employment. Among the former 'liberal studies' type topics, were subjects such as *Family Law*, *Getting Involved* (in the Community), *Women and Money*, *Women and Health*, *Women and Politics* while *Women and Business* and the oddly named *Women without Jobs* were concerned with employment issues. It was the last of these which went through a number of transformations, before being expanded to become from 1987 the pathway to employment for many women in the form of a Christchurch Polytechnic course named *Updating Skills for Employment*.

A snapshot of the participants in the *New Outlook* course in 1980 can be obtained from information collated from the enrolment forms for that year.

The age range was from under 25 to over 65, with the most common ages in the 25-35 (29%) and 36-45 (25%) brackets.

Seven percent had had no formal secondary schooling at all: 20% had between 1-2 years and 26% had completed 3 years. Therefore, slightly over half of the women attending had no more than three years secondary school and many had considerably less. (Only 10% of the women had over 5 years.)

Sixty percent were married, 40% unmarried...

In every *New Outlook* course there are several women who were 'referred' to the course by a social worker, counsellor, alcoholic unit director, etc. An average class of twenty would have three or four in this situation. It is not unusual to have in-patients as well as out-patients from mental hospitals attend. (Manthei, 1981)

Most significant in terms of change over time in the composition of the classes was marital and family status. At this time most women attending the course were mothers; it was relatively unusual for a woman without a child to attend the course and the increase in younger unemployed women without children did not come until the late eighties and more particularly the nineties. At \$10.00 (1979), \$11.50 (1980), or even \$15.00 (1981), the cost of the course was not a disincentive but the cost of childcare was. Tutors attempted to help with this problem in various ways and a few years later a grant from the Christchurch Polytechnic Foundation enabled childcare to be subsidised for a few years. During this time there was an increase in the number of women with preschoolers attending the courses, reflecting the change in both attitude and provision: the increased tolerance of the care of children in creches, and the practical measures which made it possible for women to have their children looked after while they attended the course.

The sense of perhaps slow but steady improvement in the status of women in New Zealand and in particular their ability to move into paid work, lasted a few more years despite

economic conditions worsening. In 1982 there was anger among education providers at the 3 percent cuts in the funding of community education, initiated by the Minister of Education, Merv Wellington. The consumers of such education are largely women and the *New Outlook* tutors were among those involved in the protest action.¹⁶ There was frustration at the pace of change, and the segregated nature of the labour market which kept women in a narrow range of jobs, but alongside the frustration was also a continuing hope that changes would eventuate and that the discrimination still existing against women in the workplace could be challenged and eventually overcome. *The Equal Pay Act* of 1972, the introduction of the Domestic Purposes Benefit in 1973, the initiatives of International Women's Year, the *Human Rights Act* of 1977 and the 1980 *Maternity Leave and Employment Act* had all meant advances for women and had also contributed to the sense of continuing progress. Women were slowly gaining recognition in the world of paid work.¹⁷ Between 1976 and 1981 the number of women in the workforce increased markedly, although not as much as the demand for jobs. Women's participation in the full-time workforce increased by 9 percent, from 299,289 to 328,122, and in the part-time workforce by 26.3 percent, from 100,806 to 127,302 (Hercus, 1984, p. 228).

Close connections with national initiatives and decision-makers in Wellington through education, political and feminist networks, minimised the time it took for new programmes and ideas to be implemented at Christchurch Polytechnic.¹⁸ Links with the Department of Labour and the Women's Advisory Committee of the Vocational Training Council resulted in the Polytechnic being one of the first in the country to offer *Try A Trade Days* to girls at school. This was a positive action initiative aimed at getting girls to consider a wider range of occupations than those traditionally held by women and a small time allowance was provided for a Women's Development Tutor to encourage such activities.¹⁹

Changes in the shape of the workplace were also initiated at Christchurch Polytechnic. The two tutors appointed to teach the *New Outlook* course in 1982 were among the first in the country to share a position on a job-share basis and this created a great deal of interest among those on the courses.²⁰ Inspired by the example, one student arranged with a neighbour to make a job-sharing application for a position as a receptionist which they obtained. Job-sharing appeared to offer many advantages for employer and employee in the optimistic climate of the early eighties. Although unemployment was rising it was believed that ways of sharing work around could make a difference and job-sharing and permanent part-time work were seen as methods of enabling women to take up paid employment

without this making much impact on other job-seekers. The ideal was that of two equal partners each contributing to the family income and also sharing the unpaid work of caring for children. The notion of a full two-income family, although recognised as a significant pattern in the United States, had not yet been accepted as an important concept in New Zealand.

In 1979, the first of the programmes aimed at tackling growing unemployment through the provision of job training had been set up by the Government. The TEP (the Temporary Employment Programme) was followed, during the next decade, by PEP (a Project Employment Scheme which was a job creation scheme), STEPS (School-Leavers Training and Employment Preparation Schemes), YPTP (Young Person's Training Programme), Access and then TOPS (Training Opportunities Programme).

These programmes had a major impact on the training of women. There were many variations in their provisions as one programme succeeded another, some providing for school-leavers, others offering positive action courses for women in non-traditional areas. Targeting, which involved the participants being assigned points for their situation, was a matter of concern especially when married women were discriminated against gaining enough points to qualify for the training. Those who qualified for these courses received a training allowance making the Labour Department courses more attractive than those run by the Polytechnic from Vote Education funds.

There were consequences for the *New Outlook* courses which differed from the new courses in that fees were charged, they were part-time and no allowances were paid to those enrolled. While this meant that the two types of programmes attracted somewhat different groups, during the mid-eighties the more established courses looked less attractive to some women and were overshadowed by the new. Both types of courses continued until the government withdrew from funding the courses for the unemployed. The establishment of the principle of the payment of fees by the government for those who would not otherwise be able to undertake training, particularly those who were dependent on benefits, did not impact immediately on the *New Outlook* course but would be of delayed significance. The Government had noted the importance of providing retraining for women and realised that unless retraining was provided and unless women could afford it they would not be able to find employment and support themselves.

1984 was a year of considerable activity for the *New Outlook* course and a 'Birthday Party' was held to celebrate the impact of the ten year old course on the 571 women who had

attended by this time, many of whom had commented that it 'had changed my life'. Also in this year the PEP scheme provided the staffing for a study of 84 women who had attended the course between 1976 and 1982. The statistics gathered about age, marital status and qualifications were similar to those for 1980. The first information about ethnic origin was obtained. Of the sample of 84, five came from the United Kingdom, three from the Netherlands, two from Greece, one from the United States, one from Egypt and only one gave Maori as the ethnic group to which she belonged.

Following the course ten women had gone on to *Liberal Studies* or other university courses, 43 to other courses at the Polytechnic, and six to unspecified courses. Information about difficulties women were having in gaining employment came in the figures of 24 (28 percent) in paid employment, mostly part-time, while 12 (14 percent) were trying to find employment or increase the hours they were working to full-time (Manthei, 1993).

That the figures were not a result of women being uninterested in paid work is shown by the 'Messages to the Ministry' gathered at a seminar on women in politics²¹ organised by the course tutors and held at Christchurch Polytechnic later the same year. When offered the opportunity to record messages for the guest speaker, newly appointed Minister of Women's Affairs, Ann Hercus, those present recorded such suggestions and requests as:

- Provide legislation to promote job-sharing, flexible hours and part-time work ie part-timers to have access to superannuation, job tenure, sick leave, maternity leave.
- More flexible criteria for use of funds on Government work schemes.
- Provision for paid parental and family leave. Provision of creches at workplaces and schools.
- Affirmative action to be taken in the selection of women for a variety of traditional and non-traditional jobs.
- But, so that women can take advantage of affirmative action, we want to see more flexible work patterns, including job-sharing, permanent part-time positions and glide time; adequate child care facilities; active encouragement for women to apply for non-traditional jobs.
- Extended childcare facilities for primary and intermediate school children from 3 to 6 pm.
- Will the Ministry be reassessing the situation of women beneficiaries who want to work part-time so that they can earn more than is currently allowed?
- Working conditions of women, e.g. sweatshops, corporations, banks, hospitals, schools.
- Citizen's entitlement - to overcome the problem of women being in the lowest bracket of jobs and release them from taking on jobs that inhibit personal and family growth.

Women were seeking to enter the paid workforce regardless of their family status and were articulating the measures they needed in order to do so.

Updating skills

The *New Outlook* tutors had become aware of not only the problems of women workers but also the increased difficulties that women were having in finding work, particularly work that provided some satisfaction and used some skill. The major problem was clearly that the women wishing to re-enter the workforce were doing so with no greater qualifications than when they left, and possibly in the eyes of an employer, fewer relevant skills. They might have gained a lot of organising and related skills from bringing up a family and confidence from attending a *New Outlook* course but what kind of job could they get? As one woman pointed out, on her return to the workforce she was employed in a more junior position than when she had left fifteen years earlier, and as a subordinate to a twenty year old. Clearly increased confidence was not enough to ensure a satisfactory return to the workforce; increased skills were also needed.

Women's expectations had also increased; as more women were employed, more women shared the expectation that they could have a paid job. In 1967, 30 percent of women had been in the paid workforce; by 1987 it was 40 percent. During the 1970s attending a confidence-increasing course had been a sufficient bridge to paid employment for those wanting to take this route. Now the new course, *Updating Skills for Employment*,²² became the stepping stone.

The 1972 N.C.W. report had accurately predicted that upskilling would be needed.

Lamenting the lack of advice for women seeking training and employment, it also echoed sentiments we have heard before and will come across again:

As technological advances are made many existing jobs will become redundant, and new skills will have to be learnt by both men and women. The idea that one's initial training will last a lifetime is no longer valid, and everyone should be alive to the necessity for retraining. This should make it easier for women as long as courses are made available to both sexes equally. (N.C.W., 1972, p. 39)

In fact it was women who first needed retraining courses, and for whom they were provided. This new initiative at Christchurch Polytechnic combined confidence building, with skills like mathematics (traditional skills though not necessarily for women), and an introduction to computing, at that time a new skill. *Updating Skills for Employment* was run for the first time in 1987 and for several years it was offered twice a year, less frequently than the *New Outlook* course which was being offered five times a year. Where the *New Outlook* course was a 'door opening' course, introducing those who came to opportunities in voluntary work, paid employment, and further education, along with many other areas, *Updating Skills*

for Employment aimed at building skills along with confidence. In many cases women followed the pattern that the tutors had planned by attending the *New Outlook* course first and then enrolling in *Updating Skills for Employment*. While some women still entered the paid workforce through this route, *New Outlook* was now less a course which led directly into the workforce than it had been earlier. That role was now taken up by the new course. Slightly longer than its companion course, *Updating Skills for Employment* ran over three days for eight weeks, each day beginning with a session aimed at orientating the class towards job hunting and the world of work. During these sessions the participants constructed curriculum vitae and practised interview skills, topics which were new to most of them whose experiences in the workforce had taken place before the entry to employment became so competitive. For many it had been a shock to find they could not just walk into a job as they had done when they first left school. Especially for those who had been away from paid work for many years, reorientation was necessary. Many had lost confidence in abilities that they used to take for granted and found the introduction of new technology daunting. For this reason, and because so many jobs now required computer and keyboard skills, these two subjects were core topics. There was a dilemma here, common to retraining programmes for those with less confidence, as this programme suggested that the course was aimed at returning women into traditional office and service sector jobs whereas one of the motivations for the course was to widen opportunities for the participants and encourage them into more skilled positions in different areas. The other key subjects were mathematics and an introduction to business studies and over time these have worked as stepping stones for course members who have entered occupations as diverse as physiotherapy, nursing, working as a science technician, and accountancy as well as clerical and reception work, courier driving, library work, food preparation and social work.

The new course operated alongside its predecessor and now finally, in 1987, after years of the courses for women being run in classrooms not needed for other courses, they had a home base. The first year that *Updating Skills for Employment* was offered was also the year that the Next Step Centre opened. Two classrooms, in a specially designed prefab, were complemented by a kitchen area and an office. The Centre became a resource and information centre with a system of volunteers who provided information both on what the centre offered and on help available for women in the city. Acknowledging the centrality of this work for women seeking new directions, after a year a co-ordinator was appointed to liaise with the tutors and facilitate the work of the volunteers. When the course had been

offered in a room above the gymnasium some of the participants had found it unwelcoming, confirming the importance for those re-entering education and training of an appropriate environment. Now an appropriate environment and a substantial support system had been established.

Political changes

During the 1980s among the legislation which impacted on women in employment were the *Minimum Wages Act* of 1983, the *Parental Leave and Employment Act* 1987, the *Labour Relations Act* of the same year and the *State Sector Act*. By the last years of the decade the political and social climate was changing and the impact of new ideologies was felt directly and indirectly on the courses and the women in them. The earlier goals like childcare and job-sharing which had seemed so urgent now were forgotten in the changed environment. The *Employment Equity Act*, which promised pay equity and equal employment opportunities to women, was immediately repealed by the newly elected National Government in 1990 and was followed by the *Employment Contracts Act* of 1991 which set a new industrial backdrop for workers and job seekers.²³

The issue confronting women was now not how to improve conditions for women in the workforce, but how to minimise the erosion to working conditions caused by the new laws. Women had traditionally been disadvantaged in the labour market; they now faced additional hurdles and the position of women returners had worsened. There was a strong irony in that as more women sought full-time employment, the workforce was casualised, full-time jobs became part-time, and now, more than previously, women had to compete with younger workers, including school and tertiary students for work.

The same changes that had elsewhere led to 'flexible' patterns of employment affected these women as they sought employment but found that the casualised work available was not sufficient to support them and their children. The pressures of competition and credentialism diminished the opportunities they were seeking. In education the same factors manifested themselves in an increased emphasis on qualifications and training and a decreased appreciation of non-vocational education. The Certificate in *Liberal Studies* at the University of Canterbury that had provided an appropriate next step for so many women from the New Step Centre courses folded. In parallel Continuing Education courses were downsized at other universities and the New Zealand Qualifications Authority became a major force in education.

The next step

Just as *Updating Skills* became a next step after *New Outlook* for those who wanted to re-enter the workforce in the 1980s, so too another step became necessary for women in the next decade. Increasing unemployment and competition for jobs, credentialism and the demand for qualifications, and the impact of new technologies affected those seeking work. Some women gained employment while on the course or shortly after, but more and more moved on to further training. The boost of confidence given by the first courses became inadequate for women seeking employment as the employment scene tightened. Now the mix of confidence-building and updating proved to be inadequate as the workplace became more competitive and more demanding. The graduates of the Next Step Centre courses more and more frequently moved onto other upskilling courses. Most looked to increase their desirability as employees by attending further Polytechnic courses. In other words, more rungs had been added to the retraining ladder. The 250 women who attended *New Outlook* (163) and *Updating Skills* (97) courses in 1991 and 1992 had, by March 1993, attended 581 (mainly polytechnic and university) courses in total, an average of 2.3 courses each.

Fees and subsidies

In the late eighties, fees for the *New Outlook* course had risen to \$60.00, and *Updating Skills for Employment* at the same time cost \$95.00. 'User pays' became the criterion also for assessing educational charges and by 1993 the fees had risen to \$170.00 for the *New Outlook* course and \$275.00 for *Updating Skills for Employment*. Because Ministry of Education funding provisions (ISCED level 9 funding) enabled lower fees to be charged for courses which did not lead to a qualification, the Next Step Centre courses escaped the distinction between 'study right' and 'non study right' fees which, by discriminating in favour of younger students, discriminated against such groups as re-entry women. This was, however, largely academic as the fees were high enough to discourage those who had been the traditional enrollees in Next Step Centre courses. The application of the 'user pays' philosophy put the Next Step Centre courses out of the reach of married women in one-income households. Even those who might be considered to live in middle income households found it hard to justify spending the amount of money required on a course for themselves. Such spending had to compete with spending on other members of the family and so women considered carefully whether attending the course justified foregoing some other goal.

A subsidy offered by the Polytechnic Department of Community Studies and funded partially by a grant from the service organisation, Altrusa, helped some of these women attend. Significantly, the majority of those applying for this subsidy wanted to attend the course which focused on preparing to re-enter the workforce. Increasing credentialism and increased pressure to re-enter the workforce are probably the reasons why, in 1993, the balance between the two courses changed and for the first time the number of women attending the three *Updating Skills for Employment* courses was greater than the number enrolled in the five *New Outlook* courses offered.

Another group which had started attending the courses in the nineties also benefited from the subsidies. During the seventies and eighties young, unemployed, and usually childless women had not been attracted to the Next Step Centre courses, but they now found *Updating Skills for Employment* offered them the chance to acquire skills they could not get elsewhere, especially with the tightening of criteria for TOPS courses. The pre-employment and retraining programmes had declined in the late eighties and early nineties and the change in 1992-3 from Access to TOPS completed the transition so that only the most educationally disadvantaged qualified for that training. *Updating Skills* was therefore an attractive option, apart from its cost which was high for someone whose sole income was a single unemployment benefit. The subsidy made enrolling possible.

By far the largest group now enrolling in the Next Step Centre courses by this time were Domestic Purpose Beneficiaries. Paying the fees was much less of a problem for this group because they were eligible for the Training Incentive Allowance which provided payment for training courses for those on Domestic Purposes or Widow's benefits. While there were some anomalies in whether the full or partial cost was paid, the allowance did mean that financial considerations did not need to be the major factor for these students in deciding whether or not to enrol for the course. Ironically, those who had appeared not at all (the young unemployed) and those who had enrolled only in small numbers (those on the DPB) on the early courses became the main participants. There were, no doubt, several reasons for this. One was the demographic and social change which increased the numbers of women dependent on benefits. With more such women in the population, more were likely to enrol for further training and they were more visible than in the days when women on benefits were uneasy about identifying themselves as such. The rising numbers of those who were not currently married reflected the increase in society both of those who had never been married and those who had become separated or divorced.

This is only a partial answer, however, as the increase in this group was accompanied by a decline in married, or permanently partnered, women. While the Training Incentive Allowance helped beneficiaries cope with the increasing pressure to re-enter the paid workforce by helping to pay for their training, increases in fees and the distinction between 'study' and 'non study right' fees, which meant mature students paid higher fees, impacted dramatically on other mature women students. The course now catered much more for the disadvantaged rather than as it had earlier, for those who may have been under-educated but were not otherwise disadvantaged.

In some cases women wanting to re-enter the workforce would now have done so directly, instead of first attending a course as their counterparts did ten or twenty years before or they may have gone directly into mainstream courses. Additionally women now spent much shorter periods out of paid employment, such as, for example, at child birth and left only temporarily, intending to return. But most significantly in the mid-1990s, the majority of women who attended the course had their fees paid for them by Income Support. While the original group of women had been mainly married with children and supported by husbands, the women for whom the course now catered were a different group from those for whom it was established. The courses had been moved from their original intention by changes in demand and the effects of government policies in education and training, employment and welfare, without this being planned, or even necessarily anyone being aware of it.

Women as pioneers

The case study of the courses for women at Christchurch Polytechnic illustrates not only an innovative response to a social need, the provision of courses especially for women, but also shifts in provision in response to changing needs. That retraining courses were established first for (married) women was because they were a social group under-represented in the paid workforce and seeking a way back in. They were largely excluded from career positions and because of new demands for skills in the labour market they needed confidence and skills training in order to participate in paid employment. Dissatisfaction with the restrictions of traditional roles and growing awareness of new possibilities meant that women began to call for and seek out these opportunities. The nature of the labour market was critical; only when it opened up to women did they stop being a reserve labour force.

The willingness and ability of the Polytechnics to respond by providing appropriate courses were crucial, as was the affordability of these courses and provision of them within appropriate hours for women with childcare responsibilities. It was important for the participants that the structure and content of the courses were especially planned for their needs, that the atmosphere was welcoming, friendly and non-threatening and the fact that the courses were for women only.²⁴ As the employment scene changed with increasing credentialism and demands for new skills, the courses moved more clearly into providing upskilling and reskilling for employment. Eventually, as the employment of women became a feature of mainstream society, women seeking retraining enrolled directly in mainstream courses and had less need of specialised provision²⁵.

This was true for bridging type courses like the Christchurch Polytechnic Next Step Centre courses and the university equivalents. *New Start* courses at Auckland and Canterbury Universities²⁶ performed a valuable role in enabling mature women to enter university under the provisions for open entry for those over twenty years of age. The *Liberal Studies* course at Canterbury University, which had been open to men and women but predominantly used by women, had been a valuable stepping stone for those wishing to attempt university study but lacking the confidence or the time or the preparation to enrol in a degree programme. *New Start* and the *Liberal Studies* programmes have disappeared as women gained more confidence, became more accepted and accepting in roles other than traditional ones, and enrolled in degree programmes.²⁷ Open entry remained a significant feature of New Zealand university education but adult women, if they could afford the fees, moved more directly to taking advantage of such opportunities.

Steps had been taken towards establishing educational opportunities for women which could widen their horizons and lead to occupational change. This adoption of life long learning would help women move slowly towards both equality with men, and towards fulfilling their own potential in the paid workforce. The special features of the rise of retraining for women which meant that this phenomenon first occurred for their gender appear to be that women, particularly married women with children, had been largely excluded from career positions in the workforce and faced social disapproval if they chose employment over full-time parenting. Changes in the wider society and in the employment market set the scene for new opportunities and the possibility of change for women if they could obtain confidence and skills. The dissatisfaction many women felt with the status quo, allied with flexibility in the education system, opened the door to retraining and employment. Their

resulting satisfaction was such that, largely by word of mouth, word of the courses spread around the city so the numbers kept rising; and round the country so that the courses proliferated in polytechnics. Women's needs for confidence building and retraining had been recognised and met.²⁸

The conditions, therefore, under which retraining became a social imperative were those changes in the wider society and the labour market which created the incentive for change; the perception by the potential students of their need; the recognition and response by the provider to this need; and the role of the state in ensuring that the courses were accessible and affordable.

Conclusion

Earlier women in New Zealand had been shut out from full participation in education by attitudes to their participation in employment. However, at the same time as acceptance of women as students and employees grew, and in the 1980s more women sought both education and employment, the ideology surrounding the provision of tertiary education, including retraining, was transformed. Women did not gain from the strongly vocational view of education signalled by the 1984 Treasury briefing papers to the incoming government because this was linked with the ideology of private benefit. Education was no longer to be regarded as a service, paid for by the state, which would benefit both the individual who undertakes it and also the wider community. After a student had completed secondary education any further education or training was his or her own responsibility. This was a fundamental shift from the previous New Zealand philosophy of education that the state should supply certain services equally to all qualified New Zealanders. The change in ideology to regarding education as a private good was to have radical consequences for the provision of education and once again women would be disadvantaged.

Many of the traditional features of the New Zealand educational system, such as open entry, had advantaged women; the major barriers for women seeking to take up educational opportunities had been perceptions of what was appropriate employment for women. Ironically, as these barriers were overcome, new ones were erected in the form of the structure of fees set by the state. The state, which had been the facilitator of opportunities, was now influenced by a predominant ideology which erected new hurdles.

The next chapter will illustrate in a different domain, that of access and participation, the changes taking place in tertiary education. This study has documented the changes on a

local level, that of women in Christchurch seeking retraining. Chapter 9, by examining access and participation in New Zealand generally, internationally, and on a comparative basis in the Netherlands and the United Kingdom, illustrates how the forces at work in the area of tertiary education, particularly education for occupational change, have been both local and global.

Notes

¹ While this remark may seem exaggerated it was repeated so many times to the tutors by the women enrolled in the courses that it came to seem a cliché.

² These seven groups were: stenographers and typists 9.3%; other clerical 18.2%, retailing, shop assistants, sales 10.7%, tailors and cutters etc 7.1%, teachers 6.9%, nurses and midwives 6.4%, housekeepers and cooks etc 6.0%. All others, accounting for 35.4%, included more women in occupations such as toolmakers, electricians, directors and managers than had been in these occupations ten years earlier in 1956. Source: New Zealand Census, 1956 and 1966.

³ Same source.

⁴ Dr Sutch was a visionary intellectual rather than conforming to the stereotype typical of a public servant.

⁵ Sutch also pointed out the narrow range of courses and destinations for girls as they substituted “vocational or easy specialisation courses for more educational subjects, for example some 30 percent of girls in public secondary schools take commercial subjects and between 15 and 20 percent a home life course; of the girls leaving school about 30 percent go into offices, 14 percent stay home or become domestic workers, nearly 10 percent go to nursing or other health services, between 7 and 8 percent to teaching and about 3 percent to university”. (Sutch, 1964, p. 3)

⁶ Beeby and Renwick were among the educationalists who had a clear vision of the social goals of education.

⁷ Dougherty is here quoting Jo Lynch, *Four Case Studies on Courses for Women in New Zealand Polytechnics* (Lynch, 1991) The name ‘New Outlook’ was specific to Christchurch Polytechnic as Jo Lynch would have known (I assisted her with her survey which was initiated as a result of the success of the Christchurch courses), but of which Dougherty appears to be unaware.

⁸ Stereotypes current in the 1970s included: Women work only for pin money; they don’t take their careers seriously. Women are too emotional to be managers; they take things too seriously. Women are best suited to jobs requiring a high degree of manual dexterity, patience and repetition. Women are unreliable. (Meikle, 1996, p. 59)

⁹ Although the feminists who organised this workshop would have been aware that working was not only done by women in the paid workforce, the terms ‘work’ and ‘working’ were often used loosely to refer to paid work. Even in 1989, Judi Patterson and I, both women working in the area of retraining women and aware of the issues, chose *Working your way back to work* (Kuiper&Pattison,

1989) as the title of our book for women seeking to re-enter the workforce, letting the alliteration triumph over our feminist sensibilities.

¹⁰ Note that this title uses the phrase ‘returning to work’ again equating work with paid employment and ignoring the unpaid work of housewives and mothers.

¹¹ Statistics on ethnicity have not been kept but some information is available from enrolment forms. This comment is therefore a personal observation based on close interaction with the participants.

¹² Hansen quotes the aim of the Council as being to “create the conditions for women to make their full contribution to the national economy consistent with their individual freedom, and their responsibility as wives and mothers” (1987, p. 5).

¹³ This information is based on my experiences as a tutor and thus a participant observer. I have checked the validity of such statements with other tutors, particularly Jenny Heal with whom I shared the tutoring for over 15 years.

¹⁴ A shortened version of the course, run two days a week in suburban areas, was called ‘New Opportunities’.

¹⁵ Furey gives the date as 1979; the VTC report (1986) as 1975; Dick Hockley in his history of the Polytechnic (1990) refers to the ‘experimental play unit’ being followed by a permanent unit on the main site but gives no firm date. However he notes that the opposition from the Department of Education that there was no government policy for child care facilities for polytechnics was overcome by identifying the venture with the Students Association (p.84).

¹⁶ The protest action was nationwide; in Christchurch it was co-ordinated by the WEA, the organisation most affected by the funding cuts. My recollection is supported by Codd (1990, p. 199).

¹⁷ In 1977 Renwick, an enlightened commentator, could still write, “Women, school leavers with low attainments and poor social skills, ethnic minorities, and the handicapped, are the groups which have the greatest difficulty in getting or keeping a secure toehold in the work force. But our problems of unemployment do not have the structural character of the other western economies.” (Renwick, 1986, p32), as if structural unemployment was a condition which measured only the unemployment of men.

¹⁸ The Director of the Christchurch Polytechnic, John Hercus, was married to the first Minister of Women’s Affairs, Ann Hercus.

¹⁹ These were all activities that I was involved in or had initiated.

²⁰ Again the influence of John and Ann Hercus was evident as the arrangements made at Christchurch Polytechnic were formalised for the Public Service.

²¹ Organised by the Society for Research on Women (S.R.O.W.). I was one of the organisers. It is an example of the great variety of feminist activity at the time and the intersection of the networks which included in this case Ann Hercus and new Labour Government, Christchurch Polytechnic, and S.R.O.W.

²² As the initiator of and first tutor on this course I acknowledge the role of the Polytechnic Directorate and Marjorie Manthei, Head of the Community Studies Department, in supporting this initiative. This was the first such course in New Zealand.

²³ The *Employment Equity Act* was the product of the Labour Government which lost office in 1990 to the National Government. The two Acts spell out clearly the differing attitudes to intervention held by the two parties and governments. While the Labour Government (1997-1990) was market driven in economics, it was committed to intervention in, for example, matters relating to employment equity. This act aimed to set up a system, for not just equal pay and equal employment opportunity, but also to establish 'equal pay for work of equal value'. In contrast the incoming government strongly opposed such measures, believing the market should, and would, establish the relationship between employer and employee. *The Employment Contracts Act* by dis-empowering the union movement moved the balance of power away from employees and towards the employers.

²⁴ The 'women only' provision was at first non-controversial but in the eighties some men applied to enrol. As including men would have changed the essential nature of the courses with their focus on the lives of women exemptions were applied for annually, in Christchurch at least, to run them as 'women only' under the Human Rights Act's affirmative action provisions. Under Section 28 of the Human Rights Commission Act, 1977, the Commission may approve any plan or special programme for the assistance of persons or groups of persons of a particular sex or marital status if it considers that those persons or groups need, or may reasonably be supposed to need, assistance or advancement in order to achieve an equal place with other members of the community.

²⁵ Monetary considerations were major constraints for many women. They could take advantage of the opportunities if they could afford the fees or were prepared to take up a student loan. (See NZUSA, 2001)

²⁶ These were the first universities to offer such courses at New Zealand universities.

²⁷ At Canterbury University, the sole provider of the *Liberal Studies* course and the dominant provider of *New Start* programme in the Christchurch area, the *Liberal Studies* course ceased in the 1990s and the *New Start* programme was offered for the last time in 2001.

²⁸ These findings are supported by the sales of *Working Your Way Back to Work* which was aimed primarily at women who could not attend a retraining course perhaps because of their distance from an institution.

Chapter Nine

Access and participation

The world economy is changing as knowledge supplants physical capital as the source of present (and future) wealth. Technology is driving much of this process, with information technology, biotechnology and other innovations leading to remarkable changes in the way we live and work. As knowledge becomes more important, so does higher education. Countries need to educate more of their young people to a higher standard; a degree is now a basic qualification for many skilled jobs. The quality of knowledge generated within higher educational institutions, and its accessibility to the wider economy, is becoming increasingly critical to national competitiveness.

World Bank, 2000, p.15

The delusion that there are thousands of young people about who are capable of benefiting from university training, but have somehow failed to find their way there, is ... a necessary component of the expansionist case... More will mean worse.

Kingsley Amis, 1960

Previous chapters have outlined the changes in access to, and participation in, tertiary education. Both are clearly important for education for occupational change. Without access people cannot participate in education. Furthermore even if they have access but other factors prevent them from making use of it, then their education will be curtailed. This chapter examines questions of access and participation in more detail. It first considers the expansion in tertiary education that has taken place in many countries, including the two chosen for closer comparison in this study, the Netherlands and England, and the greater opportunities for participation which this presents. It then shows that New Zealanders' participation in tertiary education has increased, particularly the participation of those seeking retraining. But it will also be shown that the increase in mature students which has taken place as a component of this increase in participation has been largely ignored. This

can be seen in the relevant statistics which both reveal the increase and also help to explain why it has been invisible.

Chapter 9 then compares the tertiary systems in the United Kingdom and the Netherlands with that of New Zealand in terms of their provision of opportunities for retraining. Changing views of the nature of education and of knowledge are considered. They underlie discussions and decisions about what kinds of education should be provided, for whom this education should be available and who is taking advantage of it. While much of the change world wide is seen as inevitable, and justified in terms of necessity, underlying philosophical beliefs are influential in establishing the agenda of change. The aim here is to distinguish between global and local forces in the provision and uptake of retraining.

Elite, mass and universal systems

The substantial changes taking place in employment, parallel a social revolution in tertiary education in many Western countries. Just as universal primary, and secondary education had become the goal and then the norm in the late nineteenth and the first half of the twentieth centuries so an expansion in higher education took place in the later part of the century. Participation began to be regarded not as a privilege but as a right (Scott, 1995).

In New Zealand as elsewhere, tertiary education had been primarily university education and limited, in the percentage participating, to an 'élite' section of the population. Chapter 1 referred to Trow's schema¹ for distinguishing between élite, mass and universal systems of tertiary education which have been used in this study and which make international comparisons possible. Trow's linear definition alerts educational researchers and others to the impact of incremental growth in student numbers by providing useful categories for historical comparisons and charting changes. There are some problems with the schema.

First, it does not distinguish between different types of students, such as the part-timers and full-timers, the school-leavers and mature entrants or returners. The latter group are significant for any investigation of retraining. The proportions of these vary considerably from country to country and the availability of part-time study impacts on the accessibility of tertiary education. In New Zealand, opportunities for part-time study at university have long been available, so being employed has not necessarily precluded people from studying for a degree.

Second, the term 'élite' implies opportunities for participation are restricted to a privileged group. Barnett (1994) suggests the traditional role of education was the production of

knowledge by and for a small élite with relatively little impact on the wider society. This was true for much of the university's long history and may have remained true in the twentieth century for Europe, especially the United Kingdom,² but it has not been the case in New Zealand. Those who first took advantage of the opportunity at Canterbury University College were "mainly 'minor professional' and 'lower middle class' " (Gardner, Beardsley, & Carter, 1973, p. 159). While New Zealand tertiary education has been until recently, according to Trow's typology, an élite system, as discussed earlier it offered comparatively open entry. Fees were low and degree courses were accessible not only to full-time students who had gained entry qualifications but also to part-time students and those who had achieved the age of 21 (and later 20). These provisions are clearly not only for the privileged. While 'massification', the growth of student participation tertiary education, is a recent phenomenon in New Zealand, the provision of university education has long had the requisite characteristics for those who wish to upskill or reskill. That access and participation are not synonymous but distinct is not obvious in Trow's classification of élite, massive and universal systems.

The shift to a 'mass' system became apparent and was first articulated in the 1960s (Scott, 1998), in the United States, an affluent country where the population was more mobile in both geographical and class terms than in Europe. After the Second World War the mass system there included two-year colleges which opened up the opportunity for further education to a larger section of the population than could attend the universities of Europe. Participation rates rose and stayed high.

Attending college has always been expensive, but it became 'necessary' in the United States rather than optional when the GI Bill began paying veterans' tuition after World War II.³ Previously fewer than five percent of the U.S. population held college degrees. Today, 50 percent of the college-age population receive some post-secondary instruction. Higher education is now perceived as "the American passport to the middle class" (O'Brien, 2000).

In Europe many systems underwent a similar expansion and for similar reasons.

In the 1960s and 1970s most developed countries reshaped their higher education systems. The extended systems created in this period replaced the much more narrowly based university systems typical of the pre-war era. They were developed in response to, first, the rapidly rising social demand for university level education, and second, the increasing demand for a more highly skilled labour force. This reshaping took various forms. But it was a general phenomenon across Europe (and the rest of the developed world). The fundamental imperatives were the same everywhere and arose from the modernization of society and the economy. (Scott, 1995, p. 33)

First came an expansion in the size and number of universities, followed by the growth of extended tertiary systems. These extended systems were more varied than the traditional model composed of, or at least dominated by, universities. As happened in New Zealand's tertiary system, the distinctions between higher and post-secondary systems became blurred. Polytechnics were established and grew in the United Kingdom, for example, where higher education had been,

almost exclusively the concern of a small number of universities. Compared with those in other countries they [the universities] were characterized by social and academic elitism and by a high level of independence from government. (Elliott, 1998, p. 35)

The English polytechnics became first, degree granting institutions, as many subsequently did in New Zealand, and then, universities “against a background of reduced funding per student” (Elliott, 1998, p. 35). Between 1970 and the 1990s, in the United Kingdom the age participation rate for 18 year-olds grew from 10 percent to 30 percent and the numbers of adult students increased. In 1995 – 6, 42 percent of the total undergraduate population in the United Kingdom were aged 25 or over (Merrill, 1999, p. 22). These older students were found particularly in the ‘new’ universities and also in the further education (non-degree) sector.

Increases in participation rates occurred very quickly. The number of post-secondary students in France, for example, grew from fewer than 150,000 students in 1955 to over two million, representing more than 46 percent of the 18-23 age group, in the mid 1990s. In Germany, in the two decades since 1977, student numbers increased by more than 80 percent. World wide, between 1980 and 1995, the numbers of students increased from 51 million to 82 million, an increase of 61 percent (Sadlak, 1998, p. 101).

In OECD countries these increases take participation rates, according to Trow's model from ‘élite’ to ‘mass’, until they are now close to, or in, the ‘universal’ range.

Around 1950, the proportion of graduates was less than five percent in most European countries. The respective proportion doubled in many countries within about ten years ... Today, enrolment at institutions of higher education has on average surpassed 40 percent of the age group in OECD countries. (Brennan *et al.*, 1996a, p. 11)

Scott cautions against comparing participation rates between one country and another without ensuring comparability of the measures.

The current age participation index in British higher education is 32 per cent, which suggests the system is more than half-way towards becoming a universal system. As

American higher education includes the two-year community colleges, it is necessary to add in post-18 students in further education colleges to secure a fair comparison. So the true participation index is already nudging 40 percent. (Scott, 1995, p. 2)

The rise in participation is undeniable even if figures from different countries are not always strictly comparable. The growth in tertiary education occurred in all western countries. In Australia, Colleges of Advanced Education and TAFE institutions flourished. The German *fachhochschulen* and Dutch higher professional schools (HBOs) played key roles in their national systems. Pluralism and diversity, as well as growth, now characterise the sector.

Commodification of knowledge

The changes affecting New Zealand tertiary education have, therefore, not taken place in a vacuum. Countries all round the world have responded to the belief that there is an economic imperative for this expansion in higher education. Evidence can be found in the actions and pronouncements from Western countries and, more recently, also in those of the developing countries.

Overall, the policy of wide access to HE⁴ is nowadays a rule rather than an exception. The argument for the continuation of this policy is based, among other things, on estimations concerning the evolution of labour markets which show that in the course of the next decade some 40 per cent of all jobs in the industrialized countries will require 16 years of schooling and training. (Sadlak, 1998, p. 102)

Scott contends that support for higher education depends on politicians believing that universities are national institutions created to fulfill national purposes (Scott, 1998, p. 113). According to this conjecture, the American educational expansion between 1945 and 1980 was due to a massive investment in the state's military capacity. More recently, round the world, national concerns with economic development and, in the case of the post-colonial world, nation building, have provided the impetus for expansion.

Rightly or wrongly politicians believe investment in HE can be translated into comparative advantage, a belief encouraged by theories of post-industrial society which suggest that 'knowledge' has become the primary resource in advanced economies. Both theoretical studies such as Daniel Bell's *The Coming of the post-Industrial Society* (Bell 1973) and the more popular accounts such as Robert Reich's *The Work of Nations* (Reich 1992) concur that investment in scientific research and in HE has now become a key factor in international competitiveness. The instruments of international advantage are no longer fleets and missiles but 'intellectual property', in the shape of both basic science and commercial patents, and 'human capital', in the form of a highly skilled workforce. HE also still plays a key role in the creation of national identities and the reproduction of national élites. (Scott, 1998b, p. 111)

Support for this argument is found in the United Kingdom *Education Reform Act 1988* which “was predicated on the assumption that a major role for HE was that it should ‘serve the economy more efficiently and have closer links with industry and commerce and promote enterprise’ ” (Elliott, 1998, p. 35).

This view of higher or tertiary education as preparation for employment links strongly with that of education as an investment. Just as greater participation in secondary schooling changed the nature of secondary education from an academic pursuit to a more general one so, as more students enter tertiary study, the aims and nature of that pursuit have become more vocational. Massification and the increasingly vocational nature of tertiary education appear to be closely linked.

Barnett (1994) describes this a shift from knowledge as process, to knowledge as product and commodity. This is a worldwide shift as credentials are sought, a move that alarms many educationalists who believe that distinctions between knowledge and vocational education are disappearing (Codd, 1997, p. 134). Marginson (1993, p. 170), writing in Australia, refers to changes in that country when he argues that the convergence of general and vocational education, with its accompanying emphasis on learning outcomes, is essentially an economic reform. His arguments resonate in other countries as well. Marginson’s analysis, like that of Scott (1995), leads him to the conclusion that education was affected by the replacement of the Keynesian ideas of social investment, which were prevalent till the mid-1970s, by the Monetarist assumptions as popularised by Friedman and others (Marginson, 1997). Other commentators agree.

Education was seen as being crucial to economic competitiveness, and economic competitiveness required micro-economic reform, restructuring of education systems, and linking educational objectives much more closely to economic agendas. (Harman, 1998, p. 5)

Clearly the university today is no longer that envisaged by Cardinal Newman, in *The Idea of a University*, as dedicated to the pursuit of knowledge for its own sake and to “the high protecting power of all knowledge and science, of fact and principle, of inquiry and discovery, of experiment and speculation” (Newman, [1852], 1960, p. 98).⁵

The university as the creator of economic growth has been embraced as the mechanism by which a country augments its human capital the better to compete in the global economy. The phrase, ‘the knowledge society’, is used universally and hegemonically:

The notion of the knowledge society is hardly new. ... The post-war expansion of university science was based on the assumption that to invest in knowledge was to invest in growth.

What is new is the way the debate is currently framed. The globalisation of the world economy, together with declining demand for manual labour and the simplistic belief that this must put nations increasingly in competition with one another, has lately given investment in knowledge a political resonance it lacked before... As this sort of thinking takes hold among politicians, the university moves ever further from its origin as a sanctuary from the world around it [and becomes] more an incubator of new industries in a technology-dominated economy. (*The Economist Survey of Universities*, 1997, p. 5)

Causes and consequences

Of the parallel developments associated with the changes in tertiary education it is difficult to be certain which are consequences, rather than causes or coincidences. Some are general in character, linked to the state; others have their impact mainly on individuals.

The state as regulator, not provider

Foremost of these is a change in the relationship of state and education. Scott (1995, p. 81) asserts that the welfare state has been replaced by the 'welfare society', in which education is increasingly supported less by the state and more by non-state funds. From this point of view, the welfare society takes up only part of the role of the welfare state. It abandons the role of provider to become the regulator. It may contract out educational provision just as governments moving in this direction have done with health care, and even with prisons. Power, Halpin and Whitty (1997) argue that turning schools into self-governing institutions has been a strategy that has deflected blame for failure from the government and can be used by the state to legitimise its policies and practices. Decentralisation in the tertiary sector may similarly move responsibility for equity issues, such as providing opportunities for mature students, from the state to the institution.

The changing status of the graduate

Linked to this concept of the loosening of the ties between the state and the provision of education is that of the move of education from a production to consumption good. As has been suggested, the differential between graduate and non-graduate earnings has been eroded. For graduates, particularly those reskilling with all the uncertainty involved in that activity, the suggestion of narrowing rates of return is a sobering thought. Reflection suggests that while economists appear not to have given much consideration to this, lesser

returns to the individual seem likely. As spending time in tertiary education becomes less restricted to an élite, so too do the rewards. No longer will most graduates enter professions for which a university education is a significant credential. With the increasing numbers of graduates resulting from massification and universalising of tertiary education, a degree is not a sufficient credential for a position to which it previously facilitated entry. Graduate status is no longer a rare commodity. So, significantly among the consequences for individuals, the roles of the tertiary student and of the graduate have changed. Neither of these roles is any longer as selective and exclusive as they once were.

Higher education has become more and more a necessary prerequisite for high-level careers but also a less and less sufficient prerequisite... We note concurrently a growth of occupations typically filled by graduates, an increase in the number of graduates entering middle-level occupations, a growth in the (still) small proportions of graduates ending up in blue-collar jobs, as well as an extension of search periods and initial uncertain employment. (Brennan *et al.*, 1996a, p. 4)

As tertiary education becomes the norm, its prestige and status is eroded. In commenting on this, Scott both overstates and understates the case as he refers to the changing experience and expectations of students and graduates.

The old links between HE and élite occupations inevitably and inexorably are diluted in mass systems. These links still exist of course. Universities still maintain their monopoly in the production of doctors and lawyers. But many graduates in mass systems will not occupy such privileged and prestigious roles in the labour market. Instead they fill in the ranks of middle management and staff the swelling public bureaucracies. And, more radically still, in an age of shortening working hours and working lives, and so-called flexible employment, the bonds that link HE with the professional labour market become looser. *For some graduates HE provides them with resources, intellectual and cultural, social and personal, which they deploy outside the context of paid work.* (Scott, 1998b, p. 114; emphasis added)

What Scott asserts is, in general, true: the old exclusivity of the university graduate is challenged by the inclusion in tertiary education of more undergraduates and more tertiary students of other kinds. More will go on to employment that is not professional and start in positions that cannot be regarded even as middle management. However, there has always been a minority for whom this has been true. For example, those women in New Zealand who earned university degrees early in the twentieth century seldom achieved careers commensurate with their achievements at university and a number did not enter the paid workforce. They deployed their resources outside paid work, in community and cultural pursuits.

What is significant and different is the necessity for graduates to downsize their expectations of the rewards of university study. Most students (and their parents) still expect that the positions they will earn on graduating and the monetary rewards they will gather during their working lives will be of the same order as those gained by graduates of earlier generations. There is a time lag in expectation.

Those seeking to reskill are no more immune to these expectations than are those embarking on study straight from school. If their motivation is to improve their standard of living by changing occupation, it is not surprising if older students base their expectations on the occupations and salaries gained on graduation by their contemporaries who earned degrees earlier. Mature students may have some awareness that it will be harder to achieve a position as, say, a partner in a law firm but they may be shocked to find that what a government department may offer a law graduate will be part-time work at an hourly rate.⁶

Graduates are thus headed for different destinations than graduates of the previous generation; they belong to a less exclusive group in society and are not necessarily destined to become professionals or members of élites. Importantly, their employment prospects are uncertain and may more commonly include self-employment or flexible employment. This may involve holding several jobs contemporaneously, or in succession, or working as a consultant on the periphery of an organisation's core. The changes in the world of work referred in Chapter 3 such as flexible work patterns, core and peripheral distinctions, contracts for consultants, part-time and temporary positions and teleworking, will affect them.

In the United Kingdom, as in other countries, educators are coming to believe the primary aim of higher education

should be to equip graduates, in the process of acquiring content knowledge, with the necessary generic skills, and in particular learning skills, to cope with change and adapt to new situations and context. University graduates of the 21st century will need to be flexible and adaptable; ready to work on short-tem contracts rather than in long-term positions and often make multiple career changes in the course of their working lives. (Nightingale, 1997, p. 3)

Changes in student life

For students, as for graduates, there are changes in what they can expect and what they will experience in life chances and lifestyles. The numbers of students, young and mature, have increased dramatically, irrevocably changing the nature and character of student life from

that experienced by students in an élite system. Scott asserts that for members of the middle class or for those who aspire to it participation has become universal⁷ and participation by women has increased sharply. When students were a small proportion of the population, engaged in the activity and lifestyle of university study for a defined period of time, they were, and conceived of themselves as, distinct from those in the workforce.

In New Zealand, students had not been a financially privileged élite, but rather a group prepared to live frugally for a period in order to enjoy the lifestyle of a student, and in preparation for professional careers. Most were young and single without dependents. As members of a minority that was distinct, though financially straitened, they were prepared to forgo, for the period when they were studying, the benefits enjoyed by their contemporaries who were earning. Their expectations were of benefits delayed, to be gathered on graduation and entry into élite careers.⁸

Among the consequences of increased participation may be, as Scott suggests, that for students:

Mass systems shrink the years of structured employment, by delaying entry into the labour market and offering meaningful opportunities to many employees whose jobs do not provide them with sufficiently stimulating experiences. Under post-industrial conditions mass higher-education is as important a form of socio-cultural consumption as investment in high-technology skills. (Scott, 1995, p. 114)

The current position of students is not that of a group separated from the rest of the community by lifestyle and lifestage but that of members of the wider society who spend some or most of their time in study. Students are no longer distinct in being out of the work force; many work part-time or even full-time. While some are school leavers the age range is increasingly wider and the average age has risen.⁹ Their financial position is determined more by their other characteristics and life stage than by their status as students. And above all, the period during which they study is no longer so circumscribed. Lifelong learning has meant that, in New Zealand, your tennis partner in his thirties may have given up his accountancy practice to study computing; the builder altering your house may be studying part-time for a law degree; the woman whose children are now students has enrolled in a three year art course at a tertiary institution; the 75 year old widow who missed out on a university education when she married 50 years ago is studying classics; and the librarian is upskilling to improve her qualifications.¹⁰

The impact of these students seeking education for occupational change and the effects of this growth in diversity of the student population on student life have been largely

unrecognised. 'Being a student' as it was previously experienced: a distinct, confined period in the lives of a small group, is a phenomenon in decline.

The invisibility of the rise in retraining

Given the place that retraining has in the rhetoric of state policy, it might be thought that it would be a significant object of study since, until there is recognition of the increase in retraining, government policy cannot respond effectively. Until there is recognition of the numbers of those undertaking education for occupational change, provision will not be made for the individuals seeking it. Crucial to an appreciation of the importance of rise in retraining therefore is an ability to uncover its existence. As mentioned in Chapter 1, the rise in upskilling and reskilling through tertiary education appears have been unrecognised and unacknowledged, just as for much of human history women's work was unrecognised. The reasons for this include that it is often a private activity which has increased incrementally, but as the result of individual initiative, rather than as a result of government policy and planning.

It is interesting to see how retraining has been rendered invisible in the way in which statistics about participation have been presented, showing that not all organs of government and supranational agencies are necessarily working in harmony. Some of the most reliable statistics in the area of education and training are those gathered in OECD countries, including New Zealand, and published by the OECD (1983; 1992; 1995; 1996; 1998; 2000). Unless the way in which these statistics are presented is considered, a significant change in social patterns may be overlooked, the increasing numbers of those undertaking retraining ignored.

Crucial to an ability to deconstruct the relevant statistical information is knowledge of the key rates and ratios. With this information, the tertiary participation rates can be understood more clearly. Tertiary education participation rates from the OECD 1998 report have been chosen as the illustration because this report represents a turning point in participation rates for New Zealand. (The figures published in 1998 record participation in tertiary education in 1995. Figures from the 2000 report are used in the discussion of participation in tertiary education later in this chapter.) Despite the fact that at this date (1995) in New Zealand there was still concern about low rates of participation in tertiary education affecting the country's economic performance, OECD statistics show New Zealand as having a tertiary enrolment ratio of more than 50 percent.

The 1995 gross enrolment rates for New Zealand tertiary students are, at 51 percent for males and 66 percent for females, sixth highest of the 178 countries covered, equal with that of Norway. The highest figures are, of course, for the United States with rates of 71 percent for males and 92 percent for females respectively and, perhaps predictably, the other countries in the top group include Canada, Australia, and Western European countries like Belgium and Finland (OECD, 1998).

Even more surprisingly, New Zealand is also shown as having 163, 923 tertiary students in 1995 and a 'tertiary attainment' ratio of 39 (defined below), second highest in the world, equal with Denmark, and far ahead of the next countries, Canada at 29 and Australia at 24. The Netherlands and the United Kingdom, the other countries referred to in the present study, have attainment ratios of 19 and 16 respectively. Not only is this figure unexpected but, according to these figures, New Zealand's 'tertiary attainment' rate is second only to the rate of 49 for the United States which is known to have levels of post-school participation which are outstanding in comparison with other countries. How can the reported rates be so high in New Zealand when institutions and the government lament the low participation rate, and when 18-24 year olds are clearly not present in, and certainly not graduating from, tertiary institutions in these numbers?

Given that, in addition to compiling information from government statistics

[a]s part of its work, the Secretariat for the Task Force on Higher Education undertook some independent research describing and analysing cross- country patterns and trends in higher education,

how can this apparent discrepancy be accounted for?

Several suggestions all seem likely to provide part of the answer. Some relate to the choice of data. There is no mention of how part-time enrolments are handled: whether they are included with full-time enrolments or ignored. Other possible explanations relate to the quality of the data, an explanation that is most applicable to less developed countries. Appendix 3 of the report reports comprehensively on the methods of data collection and their shortcomings but these problems are not relevant for OECD countries like New Zealand where the quality of data collection is rigorous.¹¹

Another possible explanation lies in the definitions of attainment rates and gross enrolment ratios. Attainment rates

measure the highest level of education in which individuals were enrolled. The data reflect the attainment rates for the population that is over age 25. Attainment rates do not imply that all students completed this level of education. (OECD, 1998, p. 100)

Perhaps New Zealand's high rates of part-time participation in education, including adult education at tertiary institutions such as polytechnics, may account for some of the discrepancy. It seems likely however that the following definition (with emphasis added) provides the major part of the answer:

The gross enrollment ratio is the total enrollment at any given educational level, *regardless of age*, divided by the population of the age group that typically corresponds to that level of education. The specification of age groups varies by country, based on different national systems of education and the duration of schooling at the first and second levels. *For tertiary education, the ratio is expressed as a percentage of the population in the 5-year age group following the official secondary school-leaving age. Gross enrollment ratios may exceed 100 percent if individuals outside the age cohort corresponding to a particular educational level are enrolled in that level* (OECD, 1998, p. 101; emphasis added).

Thus the explanation for how the secondary enrolment ratios for New Zealand were able to reach a rate of 117 percent in 1995, lies in the number of students *over the school leaving age* who were attending secondary school. The 'tertiary attainment ratio' is boosted by returnees but their contribution to the ratio remains invisible and unrecognised.

Similarly, and most significantly for this study, New Zealand's high numbers of mature students in tertiary education are not recognised in these statistics. These students despite their particular character, are merged into the statistics as if they were school leavers. This is probably the most telling of the explanations. Those entering, or returning to, tertiary study at ages greater than that of the school-leaver, are invisible, their existence as a distinct group unrecognised.

In sum, while the rhetoric acknowledges life-long learning, even the OECD statistics have ignored the life-long learner to the detriment of ostensible state policy and in contrast to OECD pronouncements. As we will see this is true also for much relevant policy.

Indicators of participation

This oversight is addressed for the first time in an OECD report in the 2000 edition of *Education at a Glance* (OECD). OECD documents, such as the report on the *Vocational Education Conference* (1994), *The Changing Role of Vocational Education and Training* (1995), *Lifelong Learning for All* (1996), *Redefining Tertiary Education* (1998), provide

information on policy, provision and educational achievements of the member countries of the Organisation for Economic Co-operation and Development, including the United Kingdom and the Netherlands. These reports record that the 1990s have seen big rises in the rate at which the population participates both in initial and continuing education; that in OECD countries, the expected length of young people's education has risen since 1990, in three out of four countries by more than a year; and that in the year 2000, children can expect to enrol for more than 15 years in education - in a third of all OECD countries for even more than 17 years. In addition, adults in almost all OECD countries participate for a time period equivalent to more than one-year full-time in continuing education and training (OECD, 2000, p. 123).

The 2000 edition acknowledges that there

are several ways of estimating the stock of human knowledge and skills, sometimes referred to as human capital. The most common is the educational attainment - the highest level of education completed - of members of the adult population. This is the most easily measurable proxy for the overall qualifications of the workforce, and is a factor which plays an important role in shaping economic outcomes and the quality of life. (OECD, 2000, p. 19)

Indicators in this report compare the attainment of national populations showing how attainment has been rising over time, by comparing differences between younger and older people educated in different decades. A step forward in acknowledging mature students appears in the introduction of new indicators "designed to improve the information base on lifelong learning".

The 2000 edition of *Education at a Glance* takes a further step towards reporting internationally comparable data on life long learning and its impact on society and the economy. *The indicators on participation have been extended to cover not just the young, but all age groups.* Furthermore, information on participation in formal education has been supplemented by figures for the number of hours which a typical person would be expected to spend in education and training outside of formal education over the life cycle. Finally, a new indicator has been introduced to compare the extent of participation in job-related or career-related continuing education and training among the employed population. (OECD, 2000, p. 7; emphasis added)

The addition of these indicators acknowledges the necessity of giving greater emphasis to tertiary education, "which is now replacing secondary education as the focal point of access to rewarding careers". As much political attention paid to lifelong learning is made up of vague generalisations, the OECD statistics and analysis are very useful in drawing attention to the changing participation in tertiary education and the reasons behind this.

As demand for education continues to rise, young people are becoming more likely to study well beyond compulsory schooling, both through attending higher levels of education *and enrolling at older ages*. The factors influencing this are not hard to identify. Demand for education has never been greater, as individuals and societies are attaching ever more importance to education as a route to social and economic success. This is no longer a matter of ambitious families seeking advancement for their children, since early school leaving increases the risk of exclusion and of poor labour market prospects for all young people. (OECD, 2000, p. 9; emphasis added)

In particular the comments on age of enrolling are worth considering. Statistics showing that students are graduating at older ages are sometimes interpreted as suggesting that students are taking longer over their programmes, perhaps because they are combining study with paid work.¹² This may well be the case but, in New Zealand, statistics suggest the age of qualifying for a first degree is rising because increasing numbers of older entrants are joining school leavers (NZVCC, 1998, 1999, 2000b). The age of graduation is rising because students are taking longer over their studies and because greater numbers of older students are enrolling. For example, the average age of graduates in 1998 was 29, a year older than in the previous year. Fifty percent were over 24 years, compared with 57.8 percent the previous year, and 30.4 percent over 29 years, a large increase in one year from the 26.9 percent of the previous report (NZVCC, 1998, p. 7; NZVCC, 1999, p. 7). “The trend to lifelong learning” was also illustrated by 11.7 percent of all graduates being over 40 in 1997, but 13.8 percent over 40 in the following year (NZVCC, 1999, p. 3).

Lifelong learning may also mean that more students continue with graduate study.

About 30 per cent of students continue on for specialised degrees after their first academic or specialised degree, others complete complementary studies of technical or vocational nature. (OECD, 1998, p. 131)

We can therefore conclude, on the basis of a reading of some of the statistical evidence, that more people are retraining even if their place in the statistics is often not clearly visible. They are taking up the opportunities offered by tertiary education, but there are factors also at work to make this more difficult.

Fees and finances

For New Zealand tertiary students, financial costs of participation including fees and other costs, and the provision of allowances, bursaries and loans are a major concern. Such financial factors are clearly significant in understanding the relationship between access and participation in education for occupational change. For those returning to study, finances are at least as much a problem as for school-leavers. Mature students face the additional

problem of foregone earnings and a shorter period to recoup their 'investment' in education. Often the questions are not only how they will pay fees and support themselves but also how they will support dependents. Economists regard lifelong learning as worth the opportunity costs in terms of national advantage but for individuals it is a gamble, particularly if it is undertaken full-time. Relinquishing paid work for study requires an independent income, a financially supportive partner, or an optimistic outlook in terms of future rewards. This last, which involves trading current income for possible future rewards, is harder for women who generally earn less than their male counterparts: women will take longer to repay debts incurred during the period of study.

Government policy and, to a lesser extent, institutions, play a part in determining fees overall and for particular groups of students. Their decisions directly affect those seeking education for occupational change. In New Zealand, fees are largely a matter of government policy, in that government funding is the base for institutional funding, and fees are one of the ways in which institutions supplement government funding. As the proportion of funding supplied by the government has steadily fallen, institutions have sought other sources of funding, primarily by increasing the fees charged to students to supply the shortfall. Institutions vary in the extent to which they have been able to access other sources of funds but fees differ only marginally from institution to institution.

In the 1990s New Zealand Government policy had favoured school-leavers by providing a higher percentage of funding for their education than for mature students through the Study Right policy (as mentioned in Chapter 7). Many institutions, and most universities, disregarded the government direction by charging the same up-front fees to all students regardless of age (Boston, 1992b, p. 197). By this action they championed the right of mature students to education. In 1999 changes in funding were announced which included the phasing out of Study Right in 2000 with its removal in 2001.¹³

It is therefore important to distinguish between access to tertiary education and participation in it. Mature students may have access but be impeded from participating by various factors of which their estimation of financial costs and benefits will be a significant one. Chapter 11 will show how such factors affect one cohort of participating students. For those who are prevented from studying by the disincentives which New Zealand government policy puts in their way, the research has yet to be done.

Comparing the opportunities

We have seen that, where New Zealand is concerned, significant numbers of mature students, many retrainers among them are to be found in the statistical records. That means that they must have access to tertiary education. On the other hand, financial factors are likely to play a key role in the participation rate and decisions of individuals as to whether or not they re-enter education at tertiary level. To see if similar parameters are at work elsewhere and thus to attempt to distinguish the global from local forces in this area, comparative analysis is necessary.

Among the significant differences between the European countries and New Zealand are the emphases given in the former to workplace, rather than institutional, education and training. While this study is concerned with retraining through tertiary institutions because this is the primary channel for such further education in New Zealand, different strategies are evident in the Netherlands and the United Kingdom. In the former the government strongly encourages employers in their provision of upskilling for their employees. Lifelong learning is seen as a matter which involves partnership with employers as this government pronouncement about the *National Programme for 'Lifelong Learning'* suggests:

Everyone in the Netherlands should have the chance to keep on learning throughout their lives. This is the aim of the Dutch government in launching a new national programme of action. The government considers that "human talent is the most important economic resource the Netherlands has" and it believes that a programme of measures is necessary to ensure that better use is made of the country's intellectual resources. ... The proposed programme has been called "Lifelong Learning" (Een leven lang leren).

The programme will award a quality mark to companies which encourage their staff to undertake training courses. Subsidies will also provide an incentive for companies to call in independent advisers to inform their employees about the various options and routes open to them to improve their employability on the labour market. More funding is necessary for training people without adequate initial qualifications for the labour market, and the unemployed must be able to undertake job-oriented training without losing their unemployment benefit. The Cabinet is working on the assumption that eventually everyone will find it perfectly natural to supplement their existing vocational training by regularly returning to "the classroom". For example, employees will be offered "maintenance" contracts allowing them to undertake regular refresher courses. Encouragement will also be given to arrangements whereby learning and working are combined. (Ministerie von Onderwijs, Cultuur en Wetenschap, 2000)

Doets, Hake & Westerhuis report that an investigation into lifelong learning in the Netherlands, *Lifelong Learning and VET in the Netherlands, 2000*, concluded that the Dutch government is interested in lifelong learning for economic motives, with the employability

of the population as the key concept. An empirical study showed that participation is primarily concerned with improving current performance at work, with broader concerns such as improving personal employability mentioned less often. Employers rather than individual employees take the initiative leading to participation in training. Lifelong learning for the working population takes place mainly outside the public domain. While three quarters of the population agrees with the proposition that every adult must continue to learn throughout life it is argued that current policy is fragmented and comprises a great number of more or less fragmented initiatives (Doets, Hake & Westerhuis, 2000).

In the United Kingdom the emphasis is also on employer participation and support.

The Government provides leadership and strategic direction to Britain's training efforts. Its role is to create and support the framework in which businesses and individuals are both able to determine and decide how to address their training needs. The framework is therefore responsive, flexible and based on a partnership between Government, employers, individuals and education and training providers. (Employment Department Group, 1994, p. 4)

British employers have traditionally accepted responsibility for training their own workforces. They provide and finance most of their employees training. (Employment Department Group, 1994, p. 14)

This claim is backed by OECD data¹⁴ which show that, while in the countries surveyed "in general employers provide at least some support for about two-thirds of job-related courses taken by full-time, full-year employees", in the United Kingdom "employers financially support the vast majority of courses (84 per cent) while the participant financially supports relatively few courses (9 per cent)" (OECD, 2000, p. 198). The second highest support found in the eleven countries surveyed is found in the Netherlands (p. 202). This suggests that in the United Kingdom and the Netherlands employers and retraining are closely associated and may explain why reskilling is common, and upskilling much less so, in these countries.¹⁵

In New Zealand where the scale of both the economy and of individual firms is small, there are fewer opportunities for change and advancement within an industry. Training and retraining opportunities less likely to be employer initiated and supported.¹⁶ Unlike the other countries surveyed by the OECD in New Zealand less training occurs in firms smaller than 20 employees (OECD, 2000, p. 198). A report prepared for the Department of Labour points out that:

The commitment of New Zealand enterprises to training is mixed. The New Zealand Manufacturing Business practices survey, 1997, and follow-up firms visits, showed

employee practices are underdeveloped with only a third having HR policies, including skill development, linked with their strategic direction. The survey further suggests that the degree of skill formation within a firm is related to, and probably depends largely upon, the organisational capability and practise (sic) of the firm. In manufacturing, large firms, firms that are part of a larger group, and firms that export tend to have better than average practice, including staff training. A survey of firms involved with workplace reform in New Zealand found that while 2/3 of enterprises were putting in place skills audits and skills needs analysis, only 1/3 of the enterprises had translated these into individual development plans. (Dwyer, 2000, p. 6)

Employees are expected to take more responsibility for their own career development and to take the initiative in adding to their qualifications. On the tenth anniversary of the New Zealand Qualifications Authority, Chief Executive Norman Kingsbury noted that central to the development of the framework was the idea of a system that “worked on the assumption that people would pick up education and training when they needed it throughout their lives” (NZQA, 2000, p. 4). The record of learning was planned to accompany people through their working lives. This is a system planned to support and record individual initiatives in gaining further qualifications and credentials.

The OECD survey shows that New Zealanders in full-time employment scored highly in the number of hours spent in training, but with less financial support from employers than workers in the other countries surveyed.¹⁷ The participation rates for New Zealand are high for all categories of participation by age group, whether per trainee or per employee (OECD, 2000, Table C7.1, p. 201), second only to those of the United Kingdom. A possible link with mature New Zealanders’ high participation rate in full time education and training may be suggested by the extent to which New Zealanders found their job-related education and training of use at work (OECD, 2000, Table C7.5, p. 203).

Further, when the high rates of participation in both part-time and full-time education and training are considered together, the New Zealand desire for further education seems remarkable. While caution should be exercised in drawing conclusions from the figures there are some interesting observations to be made about the data on perceived barriers to participation in job- or career-related continuing education and training. Alongside the high rates of those who participated are high percentages of those who wished to but did not participate,¹⁸ compared to those in employment in other countries.

More than those elsewhere these workers reported the barriers to participation as being a lack of time (65 percent) or being too busy at work (66 percent). Cost is also reported as a disincentive (25 percent), more than in most countries but less than in the United States (30

percent), and ‘inconvenient hours’ are a problem (38 percent). The most striking figures are those which suggest that New Zealanders are fully occupied at work and away from it. Not only are the numbers involved large but there are significant numbers not currently involved who express a desire for further education and training, suggesting that this involvement is highly valued by New Zealanders.

Comparing tertiary systems

This chapter has considered the changes in participation in tertiary education that have taken place globally and in New Zealand. In order to investigate the extent to which the expansion in education for occupational change is a particularly New Zealand phenomenon a comparison is undertaken with the tertiary systems in two other countries.

This requires first assessing the nature of the tertiary systems in these countries to establish similarities to, and differences from, the New Zealand system. It is therefore appropriate to consider the tertiary education systems in England and the Netherlands. As with the changes in employment and economic systems, a theme that crosses national boundaries is that of extensive change in tertiary education. The differences between the systems in the three countries being studied are important because of the extent to which the systems provide and encourage those seeking retraining in the form of upskilling and reskilling.

For mature students the most welcoming tertiary education systems are those which have access which is open, not competitive; are without restrictive entry requirements based on school performance; have no or low fees; offer adequate bursaries for which mature students are eligible; and provide for part-timers with lectures or programmes which take their needs and past experiences into account. The ability to transfer from one institution to another and the opportunity to study using distance education methods are also beneficial as may be the provision of childcare and easy access using the prevalent forms of transport, and access to libraries and other facilities in evenings and at weekends. The first group of these requirements tend to be those for which the state is responsible; the latter provisions are more likely to be the responsibility of the institution.

The British higher education system

In the United Kingdom the education system varies in the constituent countries with the Scottish and Welsh traditions differing from the English. England and Wales share a “national system locally administered” (Arthur, 1992, p. 360). Like New Zealand, England

has universities and colleges for teacher education and also colleges of further education. More than in New Zealand, entry standards, combined with limited places in higher education, restrict access, particularly to university. In the United Kingdom, with some exceptions, students have to qualify for the right to study at a tertiary level and compete for a place at a specific university, or a higher education place at a college of further education. With a limit on the number of places available, university entry has thus been highly restricted.

Scott contends that British universities cannot be understood except in the context of a class society and “certainly the history of university education in the United Kingdom is strongly associated with providing for the privileged, with its aims then being those of sustaining intellectual hegemony and the socialisation of future élites” (Scott, 1995, p. 11). He suggests that mass higher education systems now “play a more active role in determining social hierarchies”. This is predicated on the argument that

socio-economic status [can] no longer be derived alternatively from occupational level, because of the rise of flexible employment and the adaptable organisation; instead it [is] more likely to be associated with broader socio-cultural attributes labelled life-styles. (Scott, 1995, p. 107)

Higher education in the United Kingdom became a mass system only a decade ago. In the 1960s 8 percent of the age group were enrolled; in 1981 13 percent; and the boundary of 15 percent, meaning it was numerically no longer an élite system, was reached in the mid-1980s. The 1987 figure of 14.2 percent had doubled by 1992 and by 1994 the age participation index had reached 31 percent (Scott, 1995, p. 5). Initially university education, provided by Oxford and Cambridge, had been socially, though not necessarily academically, élite. Growth was signalled by the establishment of the ‘old’ new universities in the 1960s and then the ‘new’ new universities. With the former polytechnics becoming universities in 1992, the tertiary system moved from binary (the élite institutions and the others) to pluralist. The sector now also includes the colleges, often found in urban settings, that operate a mix of further and higher education courses. These colleges emphasize their community responsibility to provide progression opportunities to local, often mature, students, and have a commitment to adult and continuing education.

Adult students are not evenly distributed across either the university system or the higher education sector, being found more frequently in the ‘new’ universities (the old polytechnics) than the ‘old’, and in the colleges (Scott, 1995; Merrill, 1999). Changes in participation have resulted from both the widening of entrance pathways and increased

accessibility through programmes being offered part-time, locally or by distance learning modes.

This increase reflects the growth of access routes to university whereby the traditional 'A' levels are no longer the only accepted pathways. Diversification of the student population and entry routes ... has contributed to more adults accessing HE. The FE sector also plays a significant role in providing preparatory courses for HE such as pre-access and access programmes. The availability of part-time degrees has become increasingly important in enabling adults to study at university, particularly for those in full-time or part-time employment ... For a number of years the Open University has provided an important flexible alternative for adult learners, particularly those in full-time employment. (Merrill, 1999, p. 23)

The expansion and more pluralistic nature of the sector has, according to Brennan, Lyon, Schomburg, and Teichler (1996b), had other consequences. One is the tendency for polytechnic graduates to be more likely than university graduates to see their current job expertise as being based on their degree studies (53 percent against 41 percent). A caution about attributing this perceived vocationalism to differing degree programmes is sounded by Brennan *et al.*:

It may be because the successes of university students in the labour market have much more to do with their possession of a broader social and cultural capital acquired outside of higher education than anything to do with their degree studies as such. (1996b, p. 68)

The connection between massification and vocationalism is evident, but the connection may be coincidental rather than causal. Jones (1996, p. 138) notes a shift, "albeit partial, from an élite to a populist system with a consequent expansion in student numbers ... accompanied by a greater range of vocational and professional courses and options for students". This is accompanied by a belief that "the shortcomings of the higher education system (and in particular its aversion to producing graduates with the skills and attitudes relevant to trade and industry) have contributed to the steady decline of the British economy" (Hollenstein, 1987, p. 172). Jones argues this perception is caused by

the current powerful alliance of government, industry and commerce [which] has begun to shape the higher education system in an unprecedented way. ... Indeed previous attempts by government to influence manpower planning had only limited success due to the failure to find a convincing strategy to challenge the independence of higher education ... [This was only achieved] when government increased university dependence by successive reductions in funding. (Jones, 1996, p. 138)

The structure of the tertiary or higher education sector, and the extent of accessibility of the different areas in the sector, are both of importance to those retraining. Scott believes that in

the United Kingdom the gap between the universities and former polytechnics has closed but been replaced by a new demarcation between higher education institutions and further education colleges (Scott, 1995, p. 35). In comparison with universities in Europe such as those in Germany and the Netherlands, British universities emphasize broad education rather than providing a foundation for professional specialists (Scott, 1995). In the former two countries there is not a university hierarchy equivalent to that in the United Kingdom.

British programmes also differ by being shorter so that graduates are younger.

One consequence of the emphasis on the personal and individual development of the students, taken together with the shortness of the programmes, is that vocational preparation in Britain is frequently not completed within the Bachelor's degree and the nature of the degree may be less of a determinant for subsequent employment than the equivalent qualification in other countries. (Brennan *et al.*, 1996b, p. 53)

This feature of the British system, which is even more markedly the case with school leavers in New Zealand,¹⁹ is important for education for occupational change. Students may feel the need for further education in the form of post-graduate study in order to equip themselves with professional qualifications, either immediately or later through retraining.

The Dearing Report of 1997 proposed considerable changes and expansion in higher education suggesting that over the next two decades the United Kingdom must create a society committed to learning throughout life (Harman, 1997, p. 12). The aim is for employer and student demand to determine the rate of expansion, so that up to 40 percent of young people will enter higher education "because if the United Kingdom did not match the participation rates of other nations that would weaken its basis of national competitiveness". The report paid little attention, however, to

the treatment of part-time students (over half a million in England alone) whose claims were given cursory treatment in the committee's report. If we [United Kingdom] are to move to a flexible system of lifelong learning, we have to find ways to promote part-time access. (Hillman, 1998, p. 312)

Hillman is responding here to what has been called the 'gold card' of funding for full-time students, in contrast to adults seeking further education. His comments highlight the difficulties facing those who seek mature entry to tertiary education in the United Kingdom. Part-time study "has remained almost wholly absent from the traditional heart of university provision, namely undergraduate degrees in long established institutions" (Schuller, Raffae, Morgan-Klein & Clark, 1999, p. 25).

From the point of view of these British observers, part-time study is thus possible but still marginalised, in provision and student funding. In New Zealand universities, with the exception of some limited entry professional courses such as medicine, access to part-time study is equally possible at all universities. From a New Zealand perspective the fact that studying part-time is not an option at a few select English institutions is a manifestation of the class system which still affects British education. This exclusion has little significance, however, for the majority of those seeking higher education part-time.

The comparison between English and New Zealand systems is illuminated by the case of Scotland where educational provision tends to sit between that of these two countries and so provides a useful perspective. Schuller *et al.* (1999) argue for greater flexibility in the provision of higher education on the grounds that part-time study provides the highest benefits, aids lifelong learning, caters more for mature students, is compatible with distance education and may be cost saving (pp. 9-11). While Scotland has different traditions in funding and framework from the rest of the United Kingdom here too the typical student has been a school-leaver and part-time provision “constitutes a relatively low proportion of higher education” (p. 192). The definition of a ‘mature student’, in this case, is given as over 21 for an undergraduate and over 25 for a post-graduate (p. 144).

The research of Schuller *et al.* revealed that policies about part-time study tended to be made at the top of the institution, often not explicitly. Provision included ‘flexible differentiation’, the provision of special courses for part-timers and ‘flexible integration’, the provision of ‘part-time friendly’ integrated courses which cater for full and part-time students (p. 116). ‘In-fill students’ occupy places on courses where these were available so that their acceptance on a programme did not guarantee them access to any given set of courses. Similarly part-time students were disadvantaged by courses which were offered an hour at a time on three days a week. The picture that emerges is that provision for part-timers most often consists of mounting courses outside the usual hours.

The system in the Netherlands²⁰

The Netherlands has long had a tradition of not only valuing university education²¹ but also of providing quality technical training at a high level through its HBOs (Institutes for Higher Vocational Education). Institutes of higher education are open to those who have earned the appropriate secondary school diploma and at these institutions, as at universities, “most students are recent secondary school graduates” (Hogeschool van Utrecht, 1995). The

universities prepare students for professions that require an academic background, and for independent scientific work in an academic or professional setting, awarding degrees at Masters and Ph.D. levels. The institutes for higher vocational education (HBO) concentrate on 'applied science', and provide their students with the knowledge and skills they will need for specific occupations, awarding degrees at Bachelor level. In the vocational nature of HBOs and their connections with industry, these institutions parallel some streams of university and polytechnic education in the United Kingdom and New Zealand. A significant difference has been that which of the two streams in higher education a student in the Netherlands enters depends on the stream they followed in upper secondary education. Only 15 percent of the student age cohort are expected to enter university and 20 percent higher professional education.²²

Since 1993, the first three years in general secondary education has been structured in a comprehensive setting for all pupils in the 12-15 age group. After three years, a selective intake in three school types takes place. To qualify for admission to HBO, students must have an advanced-level general secondary education diploma (HAVO) or an intermediate-level secondary vocational education diploma (MBO). To qualify for admission to university in the Netherlands, students must have followed a pre-university VWO secondary school programme. Of the relevant age group, only 13 percent leave school with VWO diploma; of these VWO graduates, two-thirds go to university.

There has been considerable selection at the entrance point to tertiary education, particularly for university. This 'pillarisation', *Verzuiling*, has been a striking feature of the Dutch system. Parallel Catholic, Protestant and secular provision have co-existed as have provision on the grounds of educational and vocational destination. Such separate provision is now being challenged. The way in which student choice of occupation is restricted by decisions made early on has been recognised. Not only were student separated early on into academic and nonacademic streams but later choices of profession or career path, *loopbaan*, were determined definitively by subject choice at school.²³

There is little student mobility between universities and HBOs. The diversified system of secondary education is seen to provide adequate selection. While 70 percent of secondary schools are so-called 'private' schools, which, in the Netherlands, means they are denominational, there is no private education in the Netherlands in the strict sense.²⁴ All Dutch schools are entirely state-funded and regulated largely along the same lines.

A university first degree course basically takes four years and involves two main examinations: the preliminary (propedeuse) examination at the end of the first year, and the final (doctoraal) examination at the end of the fourth year.²⁵ Drop-out rates have been high, up to 35 percent by some estimates. Because of the extended period of time many students took to complete their studies, government grants, formerly for six years for an undergraduate degree, are now restricted to four years. Students taking longer may be granted a government loan. Students 27 years of age and below are eligible for government funding. The only higher education opportunity for those without traditional entry qualifications has been through the Open University. In practice this has also applied to those over the age of 27 because of the cost of more traditional education. Essentially the system is for full-time students though more recently “at the universities part-time study is possible” (Van Gent, 1992, p. 29).

The university system has been under scrutiny for being inflexible.

Broadly speaking in the traditional model, students enrol in a specific discipline and follow a set course. In fact, the basic requirements for the respective disciplines are laid down in the so-called Academic Statute which contains degree requirements for each discipline and detailed procedures for the approval of new courses. This demarcation of disciplines has the following two implications. First, although students have a certain amount of freedom in choosing subjects, they are basically educated in one discipline and the orientation towards an academic research culture is fairly strong. ... Such a model ... emphasises the separateness of the disciplines. ... Second, the traditional model displays a structure in which courses are linked together. ... *For students there is little flexibility to correct earlier course decisions other than to embark upon another field of study from the very beginning.* (de Weert, 1996, p. 34-35; emphasis added).

Among the disadvantages of the system, then, are the difficulties faced by someone who requires further education before they can make a career change. The strong lines of demarcation found in the education system are paralleled in employment. Long periods of training specifically targeted at preparing someone for one part, often a narrow section, of an occupation make the costs of changing high for the individual and for society.²⁶ Not surprisingly therefore, while there is recognition of the need for change, there is little evidence that education systems are changing fast enough to match the rapidly changing labour market (de Weert, 1996, p. 25). The government, like others in Europe, is concerned.

Universities are asked to assess whether their curricula are sufficiently broad and not over-specialised, and to guarantee that attitudes like team work, flexibility, creativity, adaptability, communication abilities and language are imparted to students. (IRDAC, 1990, p. 43)

Universities have taken initiatives to broaden the possibilities with moves to convergent degree courses and, although strictly speaking no such course as a liberal arts degree is offered in the Netherlands, there is a new trend to combine new courses from various disciplines with an explicitly vocational focus, such as environmental studies and business studies (de Weert, 1996, p. 39).

The Hogeschool offer more flexibility. While entry is primarily on the basis of high school qualifications, candidates without one of these diplomas but over the age of 21 can be admitted to an HBO programme on the basis of an educational assessment (Hogeschool van Utrecht web page). A need for greater transparency is regarded as a necessity “especially with regard to lifelong learning and employability” as is “more co-operation between regional training institutions” (CEDEFOP *Info*, 2001/1, p. 16).²⁷

An OECD perspective

All three countries investigated are members of the OECD which is a major source of recent information on lifelong learning and tertiary education (*Lifelong Learning for All*, 1996; *Redefining Tertiary Education*, 1998; *Education at a Glance*, 2000). The 1998 report is focused on developments and trends in the representative member countries which hosted visits by review teams.²⁸ Generalisations about the “fundamental shifts in thinking about the context of tertiary education and its aims”, a “shift in orientation” and “the greater value being placed on the skills and flexibility of individuals as a key to reducing unemployment and improving economic performance” (OECD, 1998, p. 3) therefore deserve to be taken seriously, though not uncritically. The tenor of the report is of economic development and prosperity being closely linked to increasing participation at tertiary level. The need for an informed electorate, cultural tolerance, social justice and a high quality of education are mentioned (p. 10) though perhaps somewhat in passing. Growth in participation is acknowledged and encouraged. In particular the “substantial but uneven growth in demand from mature age students” is called a “striking phenomenon” (p. 102). New Zealand’s acceptance of mature student entry is linked with the fact that “some 30-40 percent of entrants are 25 years of age or older (one of the highest proportions in the OECD area)” (OECD, 1998, p. 131).

These comparative statistics may be even more striking if account is taken of “interrupted study” which is a feature particularly of the other countries such as Norway and Denmark which report high participation rates for older students. These countries recorded higher

participation rates in 1995 than New Zealand for students aged 26-29 but given the tendency for Norwegian and Danish students to start a degree and then take time off before returning to study these figures may have a different meaning from those of New Zealand. It may be that the students in this age group are returning students in the Scandinavian countries whereas perhaps in New Zealand they are more likely to be mature entrants.²⁹ The report also suggests that Trow's definition of 'universal' participation as over 50 percent should now be regarded as being too low, with 80 percent being suggested as a new standard and "a new paradigm ... emerging whereby participation in some form of tertiary education may be expected to become the norm in our societies" (OECD, 1998, p. 9).

Adult education and equity

With government attention and funds increasingly focused on vocational education, the same concerns about the increasingly vocational nature of adult education have been aired in the United Kingdom (Arthur, 1992) and the Netherlands (van Gent, 1992) as in New Zealand. On both sides of the world, moves from the provision of a liberal education to a more strongly vocational focus have affected adult education.

The United Kingdom

Initially in the United Kingdom, the Mechanics Institutes were founded with a focus on 'self-improvement'. They then became more liberal so that the spirit of English adult education reflected middle class, Christian values such as those espoused by the WEA, values which did not fit with government control (Arthur, 1992, p. 357). Between the two world wars, adult education in the United Kingdom became more dependent on state funds and more diverse. The *Education Act* of 1944 distinguished between vocational learning and learning for pleasure, a distinction which was followed by government initiatives in vocational education and training. According to a 1982 ACACE report, leisure courses had most appeal for adult learners but a 1991 Department of Education and Science report attributed to such learners the primary motivation of seeking a qualification, "to improve their chances of employment or enhancing prospects in work" (Department of Education and Science, 1991). This no doubt reflected concern heightened by Britain's impending entry into the Common Market (Sargent, 1991). Arthur (1991) suggested that although the advent of the Single European Market required a better educated and better skilled workforce, no more than 42 percent of British workers then held qualifications relevant to their employment (*The Times*, 10 January 1991).

As in New Zealand where the WEA was threatened by the loss of government funding, the move to vocationalism had an impact on adult education in the United Kingdom. Decisions made at the local level and the fact that examination courses generally cost less than non-examination ones (Charnley, 1990, p. 283) affected participation. Re-organisation of adult education has resulted in a move from separate institutions for adults to increased proportions of adults in further education colleges. Funding is no longer provided for extra-mural courses in universities,

‘the heartland of liberal adult education’ so that publicly provided education is fast ceasing to be an independent sector. It has been either leisurized or mainstreamed. (Scott, 1995, p. 49)

Arthur concurs noting that the

catalytic growth in vocational education and training, in professional updating and in widening access to public education. ... They [the pressures responsible] have led to a breaking down of barriers within public sector education and promulgated closer entrepreneurial co-operation with industry and commerce. *They represent an increasingly functional goal-orientated approach to the education of adults, one which is dominated by direct government intervention.* (Arthur, 1991, p. 357; emphasis added)

The evidence of the history of adult education in New Zealand parallels that of the United Kingdom as Arthur, quoting Field (in Molyneux, 1988, p. 66), further comments:

Indeed, this displacement of ‘human capital approaches’ to investment in public education by an insistence upon targeted training for occupational competence is an international phenomenon. (Arthur, 1991, p. 357)

The Netherlands

In the Netherlands the beginnings of adult education, *nascholen*, were similar to those in New Zealand and the United Kingdom, with the establishment, between 1910 and 1940, of socio-cultural organisations and night schools for general social education and vocational training. In the universities the development of androgogy (as adult education is generally termed in literature about the Netherlands) was initially positive but became amorphous without clear direction (van Gent, 1996) leading to the demise of adult education in university departments. Houtkoop and Van der Kamp (1990) suggested that there would be a growing demand for adult education in the Netherlands, a resurgence, in view of its new predominantly economic function. Kraayvanger argued that in the last few decades of the twentieth century, the emphasis shifted from adult education acting mainly as a second path, to a situation where “the economic function became dominant” with career-orientated adult

education “taking up an ever more dominant position” (Kraayvanger, 1995, p. 12). Van Gent also drew attention to this trend:

On the one hand, demographic trends indicate that fewer young people will be available for the labour market, a development which will stress the need for continuing education of an ageing work force. On the other hand, a permanent retraining of adults will be of the utmost importance due to constant technological change and tough competition in a future - more integrated - European market. ... As a consequence, the more ‘soft’ sector of socio-cultural adult education will be forced to become market-orientated too and, by doing so, forsake its ideals of social emancipation. (Van Gent, 1992)

In the Netherlands two million people, 20 percent of the adult population, participate every year in basic education and literacy programmes, socio-cultural programmes, or secondary and higher ‘second chance’ programmes.

Access and advantage; differentiated uptake

In all three countries, the Netherlands, the United Kingdom and New Zealand, there are political imperatives for wide participation.

In a political system where social mobility is perceived as the means whereby individual merit is recognised and ‘wins through’, it is important to show that all sectors of the population have equal access to the means for achieving social mobility. (Benseman, 1996, p. 275)

These imperatives do not, however, outweigh the advantages that continue to accrue to those who have received a good initial education and are the possessors of cultural capital, because

the better an education pays off in terms of income, status, occupation, political efficacy, cultural competence and similar patterns, the greater the differences in socio-economic status between participants and non-participants. (Rubenson, 1989, p. 64)

As vocational education and training replaces adult education in all three societies studied, upskilling and reskilling continue to advantage the already privileged.

Workers with higher levels of educational attainment are also the most likely to participate in job-related education and training. Three times as many hours of training are invested in employees with a tertiary qualification as those with less than an upper-secondary qualification. (OECD, 2000, Table C7, p. 201)

It is these concerns that led the G8 countries at their summit in Cologne in 1999 to issue the following declaration.

Meeting our social and economic goals will require a renewed commitment to investment in lifelong learning

- by Governments, investing to enhance education and training at all levels;
- by the private sector, training existing and future employees;
- by individuals, developing their own abilities and careers.

The rewards for investing in people have never been greater and the need for it has never been more pressing. It is the key to employment, economic growth and the reduction of social and regional inequality. As we move into the next century, access to knowledge will be one of the most significant determinants of income and the quality of life. Globalization means that developed and developing countries alike stand to gain from higher standards of skills and knowledge across the world.

A commitment to greater investment in people must be underpinned by three principles:

- first, that everyone should have access to learning and training, not just those who are intellectually gifted or economically privileged, and basic education should be free of charge. Special attention should be given to the needs of the disadvantaged and the importance of combating illiteracy;
- second, that everyone should be encouraged and enabled to continue learning throughout their lives, not just in the years of compulsory schooling;
- third, that developing countries should be helped to establish comprehensive, modern and efficient education systems. (Köln Charter, 1999).

Those who are the subjects of this study are the fortunate ones who have access to further education and take up this opportunity in the expectation that their participation will benefit them and the country in which they live and work. This will not however be enough in terms of equitable provision for all.

If adults perceive finance to be a stumbling block to returning to learn, lifelong education may only become a reality for certain socio-economic groups, thus increasing inequalities and cultural capital between groups. (Merrill, 1999, p. 25)

Concern for those who have been disadvantaged by not having the same opportunity for first chance education, and awareness of how individuals and the economy benefit from further education and training, underlies the importance of wide access so that all have opportunities. Some educational systems offer greater opportunities to all than do others. Ensuring there are opportunities for mature students is a pre-requisite for any state wishing to increase participation rates in tertiary education as part of creating a 'knowledge economy'. An enabling education system by and of itself cannot, however, provide equity or even equal opportunity. Education systems and individuals exist in social contexts.

Commenting on participation rates, including the tendency for those with lower educational qualifications to have lower participation rates and to leave the work force earlier, the OECD suggests:

The patterns observed here reflect a number of underlying causes. Since earnings tend to increase with educational attainment, the monetary incentive to participate is greater for individuals with higher qualifications. In addition, these individuals generally work on more interesting and stimulating tasks, and hold functions of higher responsibility, which increases their motivation to remain in the labour force. Conversely, hard physical work, generally associated with rather low levels of education, can lead to a need for early retirement. Moreover, industrial restructuring in many countries, has reduced job opportunities for unskilled workers, a sizeable number of whom have left the job market either through early retirement schemes or because there are only limited job opportunities. The educational attainment of women and their participation in the labour market have historically been lower than those of men, and in spite of considerable advances over the last few decades, current participation rates continue to show the impact of these historical factors. (OECD, 2000, p. 261)

Participating in further education, this suggests, will be taken up differentially by various groups in society, while differences in employment and other life opportunities remain. Chapter 6 presented evidence that the openness of entry to university and other tertiary education in New Zealand occurred within a particular social context. Education systems are likely to reflect features of the society in which they exist so it is possible that those societies which offer most in terms of social and occupational mobility may be most open to providing retraining opportunities.

Comparison with New Zealand

On a continuum of four broad types of tertiary education systems suggested by Scott (1995, p. 35), the distinctions between dual, binary, unified and stratified types are based on the degree of differentiation between universities and other types of post-secondary education. The degree of separation between institutions is strongest in the dual system, where institutions are treated separately, than in the binary system, where alternative institutions are regarded as complementary, rather than inferior, institutions. In the third model institutions belong to a common system and are not formally differentiated. In the fourth, stratified system, “higher education is conceived of as a total system and institutions are allocated specific roles within it” (Scott, 1995, p. 35). The Dutch system is between dual and binary in nature, while Scott regards that of the United Kingdom as progressing from an initially dual system, through one that was binary, towards a unified system.³⁰ Dutch universities and HBOs have essentially distinct and complementary roles but, because of the close links between the English and Dutch systems, the HBO sector is seeking further recognition (Scott, 1995, p. 36).

In comparing the three countries on a continuum, the New Zealand system is closest to a stratified system, the system that is most open, flexible and so most welcoming to retraining or returning students. The systems in both the United Kingdom, and the Netherlands are therefore more restricted in the opportunities they offer to those retraining. While any generalisation about access is subject to exceptions because particular courses may have restricted entry, entrance to tertiary education and training is more open under the New Zealand system than in the comparable countries. This openness of entry is particularly marked in terms of entrance to university, for several reasons. The person returning to study in New Zealand does not have to qualify through a school leaving examination; they do not have to 'earn a place' unless they want to enter a restricted course of study; they can study part-time in person as well as by distance education; and they have the possibility of doing a general degree in liberal arts which does not require specific academic preparation.

Streaming at secondary school level aims to, and does, prepare students for different destinations. In the Netherlands the *loopbaan*, or career path has been followed from secondary school, with specialisation of such a high order and an investment so large, that changing paths was seldom considered. In the United Kingdom the rhetoric of lifelong learning is impeded by many societal and educational factors including the fragmentation of the educational system (Hillman, 1998). In New Zealand a comparatively unified, or even, in the sense that Scott uses it, 'stratified', system results in fewer barriers to change. From a British perspective,

thinking in New Zealand tends to be in terms of tertiary education with higher education being seen as part of this greater whole. This reflects a policy of seeing education as an integrated entity. (Dearing, 1997, Section 6, Appendix 5)

Entry is, of course, only part of the question of availability and accessibility. Questions of fees and other costs, in terms of both actual payments and income foregone; the nature and quality of the experience; and, of major concern, the question of whether the benefits of retraining outweigh the costs, face all those considering such an undertaking.

Individuals will make their own assessments of the value of the undertaking according to their own circumstances but will do so within a context which includes the preparation before studying and the rewards after completion. Streaming at school and occupational opportunities upon completion frame the experience of reskilling with opportunities or barriers.

Access to tertiary education and actual participation would appear to be closely linked for any group seeking tertiary education. There will, however, be distinct differences in opportunity and uptake if access is defined only in terms of qualifying for entry, and without regard being paid to the accompanying costs and the potential benefits. This is illustrated by differences in uptake among the three countries referred to and the differences in uptake between New Zealand in the past and more recently.

Conclusion

Access to tertiary education in New Zealand has traditionally been open and welcoming to adult students seeking upskilling and reskilling because of the characteristics of open entry (particularly to university), general courses of study and part-time provision. When employment was plentiful and easy to obtain without qualifications, participation rates were low. As employment became more contested and credentialism affected job opportunities, enrolments in tertiary institutions rose.

Notwithstanding the difficulty of finding the relevant statistics for this (and its consequent lack of visibility), New Zealand currently has high rates of participation in education for occupational change. However there are factors which suggest that this rate would be higher were there not financial barriers.

When tuition fees rose, predicated on the belief that education was largely a private good with its benefits accruing to the graduate, access to opportunities to tertiary education became more difficult for many students including those seeking education for occupational change. This group of students were more likely to have dependents and high opportunity costs than younger students. The implementation of Study Right policies particularly affected mature students. With the introduction of higher fees in New Zealand there were stronger disincentives to taking up retraining opportunities. Nevertheless it appears that participation rates have remained high for older New Zealand students, suggesting that they enrol on their own initiative and that they value the opportunities despite the costs.

The comparisons with post-secondary education in the Netherlands and the United Kingdom show that participation and access are both local variables subject to state policy and control. In each country local control of these variables provides different outcomes from those in New Zealand.

While features of the education system as a whole can facilitate participation, there are also other factors at work. Chapter 10 extends the comparison of the tertiary education in

Utrecht in the Netherlands, Leicester in the United Kingdom, and Christchurch, New Zealand, by examining the opportunities available to those seeking further education in these three cities of similar size, but in three different countries.

Notes

¹ Elite systems, which are considered to be those which enrol up to 15 percent of the age group; mass systems, those enrolling between 15 and 40 percent; and universal systems which enrol more than 40 percent (Trow, 1973).

² Elliott contends that British universities cannot be understood except in the context of a class society (Elliott, 1995, p. 86).

³ According to Dennis O'Brien, president emeritus of the University of Rochester.

⁴ Higher Education is referred to as HE by a number of British educators and FE is used to refer to Further Education, the non-university part of the tertiary sector.

⁵ It is, for example, interesting to speculate what Newman would have thought of De Montfort's degree in underwear design.

⁶ This example is an actual, and not isolated, case of what an honours law graduate was offered in response to an advertisement for a policy analyst by a New Zealand government department in 2000.

⁷ Perhaps it has even become obligatory. "For anyone who enjoys, or aspires to, middle-class status participation in mass higher education has now become compulsory" (Scott, 1995, p. 108).

⁸ We can see the former situation as being a classic 'rite de passage' (van Gennep, 1960; Turner, 1973) in which a transition from one human stage/state to another is marked by separation in a liminal state, often accompanied by physical removal from society and including various ritual activities. At its completion a festivity welcomes the initiates back into their new state in much the way in which a graduation ceremony goes. Lifelong learning subverts this 'rite de passage' role of being 'in statu pupillari' by making all stages and ages ones where formal institutional learning takes place and thus where the separation from the world of work and the transition to adulthood are no longer marked by a completion.

⁹ In New Zealand the age of students at the median and the seventy-fifth percentile are high in comparison with other countries, particularly for second university degrees and non-university tertiary programmes (OECD, 1998, p. 28).

¹⁰ All of these are actual examples - some of the hundreds I have come across since becoming aware of the popularity of career change among New Zealanders. One of the most striking of the examples of the readiness of New Zealanders to change careers and retrain was reported in *The Press* (16 April, 2001, p. 22) in a feature article about Ted Boraman who runs fishing and sightseeing charters. Previously he had served in the New Zealand Navy and then worked as a butcher. He trained as a psychiatric nurse and after six years in that occupation returned to the sea, combining that with

running a motel. His next career was as a diving instructor and diving commercially, before returning to psychiatric nursing, a spell as a manager of the Crippled Children's Society, and managing a rest home, until he returned to the sea. (Keast, 2001, p.22)

¹¹ For these countries, in addition to UNESCO and World Bank data, "the most significant additional source of information on education is the Organisation for Economic Co-operation and Development (OECD). The OECD collects extensive data about its 29 member countries, all highly developed nations." (OECD, 1998, p. 100)

¹² This report also recognises the importance of distinguishing between full-time and part-time study although it is unable to do so because of the difficulty of gathering comparable data.

"Except where otherwise noted, figures are based on head counts, that is, they do not distinguish between full-time and part-time study. A standardised distinction between full-time and part-time participants is very difficult, as a number of countries do not recognise the concept of part-time study, although in practice at least some of their students would be classified as part-time by other countries" (OECD, 2000, p. 133).

¹³ This announcement "favoured institutions with older student profiles" (NZVCC, 2000, p. 13).

¹⁴ Data are from the International Literacy Survey (IALS) which was undertaken by Statistics Canada and OECD at the end of 1994 and in 1995. The 'employed' population is restricted to include persons aged 25 to 64 who have been employed at a job or business in the past 12 months and worked at least 42 weeks in the previous year and whose primary work status is not student. The IALS background questionnaire records any participation in education or training in the 12 months preceding the survey (OECD, 2000).

¹⁵ Dave Maré of the New Zealand Labour Department (personal communication, November 21, 2000) suggests that in European countries employees seeking a change are more likely to stay in the same industry, if not with their original employer. Because of the size of the economies there are greater opportunities to switch jobs without changing career than in New Zealand.

¹⁶ Dwyer reports among "the key findings from the literature" is that "large firms provide more training on average than small firms" (Dwyer, 2000. p. 6). Other findings are that "public sector employees receive more training than private sector employees; the finance, insurance and social and personal services provide more training on average than other industries; part-time and casual employees receive less training than full-time employees, and less educated employees receive less training than more educated employees".

¹⁷ Perhaps the small size of New Zealand firms is a factor. In contrast to those in other countries, “the drop-off in hours per employee occurs most dramatically in firms with less than 20 employees” (OECD, 2000, p. 198).

¹⁸ Only French Switzerland (32 percent) and Canada (30 percent) reported higher percentages than New Zealand (26 percent).

¹⁹ In New Zealand students often start their first degree at the age of 18 or 19, straight from school. They can complete this in three years and may enrol for further study immediately or later; their first degree does not necessarily set them on a career path. New Zealand courses are relatively short-length, but intensive, compared to longer courses in Europe, which often fail to turn into graduation rates (Stephens, 1995, p. 60). Although formally this is not the same as the American pattern of a first general degree followed by a specialised and vocational graduate programme, in effect it often has the same result. Not until further study has been undertaken is the student qualified for and clear about their career direction. This pattern would appear to reinforce the tendency of students to seek further education for the purpose of occupational change.

²⁰ Information in this section is based Dutch government sources including the web-sites: <http://www.nl-menu.nl> and www.minocwnl/english/index.html and the web-site for the Dearing Report: <http://www.leeds.ac.uk/educol/ncihe>.

²¹ “University faculty ranked fourth in the hierarchy of occupational prestige in a recent Dutch study” (OECD, 1992, p. 47).

²² According to Appendix 5 of the (British) Dearing Report, the Dutch system of binary higher education is a reflection of this difference and also Dutch culture, expectations and priorities.

²³ Personal communication: A. B. Versloot, November 15, 1995.

²⁴ In Japan and the few Western European countries that have a high proportion of enrollments in private institutions (for example, Belgium and the Netherlands), higher education continues to be almost entirely financed by the state, which subsidizes both public and private higher education institutions (World Bank, 1994).

²⁵ University graduates can use the title of doctorandus (drs.), meester de rechten (mr.) for law graduates or ingenieur (ir.) for graduates from technical and agricultural universities. The nearest equivalents to these degrees are the Master’s Degree in the United Kingdom and the United States, the Diplôme d’Etudes Approfondies (DEA), the Diplôme d’Etudes Supérieures Spécialisées (DESS) or the Diplôme des Grandes Ecoles (DGE) in France, and the Diplom in Germany.

²⁶ From a New Zealand perspective degrees are highly specialised, e.g. at the University of Nijmegen an undergraduate degree in law will be awarded, not as a general degree in law but in Dutch law,

European law or Notarial law. The specialty undertaken will determine the graduate's occupational destination and future career to a much greater extent than in New Zealand.

²⁷ This information is based on the annual review of the qualification structure: Blokhuis, F. & K. Visser (eds), *Jaarboek kwalificatiestructuur 2000*, CINOP, November 2000.

²⁸ This report is widely based but ten countries participated fully in the review on which the report is based. New Zealand, the United Kingdom and the Netherlands were all included in this select group.

²⁹ I have not seen this discussed anywhere but awareness of the New Zealand situation and knowledge of the interrupted study phenomenon lead me to make this suggestion.

³⁰ From a New Zealand point of view and given Scott's assessment that the British system still reflects the class-based nature of the society, tertiary education in the United Kingdom would seem to have still some distance to go till it fits the unified category.

Chapter Ten

Providing for the future

KARAMEA AREA SCHOOL

ADULT STUDENTS

Do you want to learn a skill?

Do you want to gain a qualification?

Become a part-time or full-time student at Karamea Area school and for little or no cost realise your goal. Age is no barrier. People of all ages are welcome

Notice at Karamea General Store, Westland, January 2001

PISCES Feb 20 – Mar 20

Once again you will think about schools and training centres. You will even think about taking some sort of course, with the idea of improving your position in the world and also, for the sheer joy of learning.

Stars for Fun, *The Press*, 24 January, 2001

CAPRICORN Dec 23 – Jan 20

You'll look at how far you've come and how far you have yet to go and wonder if you would be better if you were more qualified. Why not ask people if they can help? You can certainly gain qualifications if you try.

Stars for Fun, *The Press*, 19 March, 2001

Fast track your future now.

Reboot with a part-time course at CPIT.

Advertisement for Christchurch Polytechnic Institute of Technology,
The Press, February 6, 2001.

As the above extracts illustrate, the ideas of lifelong learning, reskilling and gaining qualifications as an adult have become so much a part of modern life that they appear in

shop windows and horoscopes. You may also be invited to upgrade your skills as if the process were analogous with trading in your computer. What this signals is a new flexibility in access to education, a new vocationalism and, alongside these, an increase in demand for retraining.

Whether gaining access to tertiary education is as easy as suggested by the extracts above will depend partly on government policy and provision and partly on the institutional providers. Having outlined the global and national factors that create the social policy environment for upskilling and especially reskilling in New Zealand, the United Kingdom and the Netherlands, we now need to ask how the providers of retraining respond to this environment. It is clear that this response can vary widely. One might predict, for example, that the more highly stratified and closely-articulated a system the more likely there will be special providers for upskilling and reskilling as opposed to providers for school-leavers.

Before considering questions of provision for the different categories of mature students, the chapter summarises the characteristics of the four groups of mature students that are now found in tertiary institutions in New Zealand. Then, in order to understand the role these factors have played for different categories of students in the New Zealand context, it considers the general factors which facilitate, or inhibit, the uptake of upskilling or reskilling at a tertiary education institution. Some of these factors are matters of policy over which institutions have little control; others can be affected by the actions of the institutions. In addition to the obvious factors relating to entry, support and costs, the provision (or lack of provision) of distance education and the recognition of prior learning are covered.

The discussion then concentrates on the provision for adult students in Leicester, United Kingdom and Utrecht, the Netherlands, in comparison with that in Christchurch, in order to check the availability of retraining opportunities in comparable cities in the three countries. The response of tertiary institutions, particularly Christchurch Polytechnic and Lincoln University, to catering for these students is investigated in order to illustrate the extent to which providers in New Zealand play a significant role in catering for those seeking further education.

The four types of adult students

Before discussing the provision for the different types of learners it is necessary to clarify the distinctions among the four groups. The distinctions have emerged from considering lifelong learning in historical, geographical and statistical contexts as discussed in the

previous chapters. The discussion is necessary because each group differs in the support it required from providers.

Recreational learners are perhaps the most traditional adult learners. Although they are not the main focus of this study, they have been referred to earlier and it is important to acknowledge them. They are learning for the enjoyment of doing so and educational activity is part of their lifestyle, whether or not they are employed. Such learners include, for example, those who attend the WEA and Continuing Education courses. They are not of high priority in this study because they are not primarily seeking credentials. However, as has been pointed out, the motivations of learners are often mixed and can change in the process of their education. Students may, therefore, fit in this category and one or more of the other categories, either throughout their education or during a particular phase.

The *second chance learners* are a widely recognised group of adult students. *Re-entry women* are a sub-set of this group, sharing the characteristics of making a tentative foray into tertiary education, often with a sense of entering an alien world. These learners are gender or socio-economic disadvantage, seek to redress this as adults. Usually they embark on part-time study in combination with other activities and responsibilities, particularly child-care. Women make up a large proportion of second chance learners; the case study in Chapter 8 explored the changing nature of the access to education in Christchurch for this group. Previously in New Zealand this was the dominant group of mature students. Study has now become a mainstream activity for many more New Zealand adults. In the United Kingdom second chance education appears to be a contemporary focus for attention.

Like second chance adults who normally study part-time, the *upskillers* are frequently part-time students, usually because they are combining study with paid employment. Upskilling is associated with increasing skills and credentialism. Employers may provide support in terms of payment of course fees and may also encourage employees by permitting them to attend courses in work time. Students thus supported are helped to deal with financial costs and their major opportunity cost, that of time. Learning undertaken to upskill may be brief or extensive. The students may be already be experienced in terms of education, or in terms of having acquired skills and knowledge on the job. These upskillers are found in all economies; in terms of this study they are most strongly identified with the Netherlands.

Reskillers are the students whom the study has identified as seeking education for occupational change. They represent a new phenomenon, adults seeking further education

mainly to gain skills and credentials to enter a new vocational area. Their existence has been largely unrecognised until recently and is still uncommon, particularly in two of the three countries in the study. They are becoming more prevalent in New Zealand tertiary institutions. In general these students have been previously employed. In deciding to make a major life change they make considerable sacrifices, in terms of income foregone, and in the time pressures that study imposes on their families and themselves. Both women and men are undertaking this commitment.¹ It is the emergence of upskilling in tertiary institutions in New Zealand that prompted this study.

TABLE 10.1 General characteristics of mature students

RECREATIONAL LEARNERS	SECOND CHANCE	UPSKILLERS	RESKILLERS
Study as part of lifestyle	Study combined with childcare	Study combined with employment	Study between employment in different occupations
Part-time, sometimes full-time	Part-time, sometimes full-time	Characteristically part-time	Characteristically full-time
Women and men	Predominantly women	Women and men	Women and men
Education as recreation, not primarily seeking credentials per se	Returning to the workforce via education; seeking entry credentials	Seeking additional credentials for occupational enhancement	Seeking credentials for occupational change.
Educationally advantaged	Educationally (and socio-economically) disadvantaged	Educationally experienced	Educationally experienced
Worldwide	Currently significant in the UK	Currently significant in the Netherlands	Emerging in New Zealand

Providing for mature students

In the following discussion I focus on provision for learning by students in the three last categories, the second chance learners, those upskilling and those reskilling. Those who are learning as a recreational activity were included in the analysis above as an identifiable group of adult learners but provision for their learning is outside the scope of this study.

Adults who seek upskilling, or more particularly reskilling, have, as students, particular needs which are less often crucial to those who enter tertiary education as school-leavers, unencumbered by dependents and without the expectations or demands which come from

Having been self-supporting and in employment. The systems which have been identified in the previous chapter as being most welcoming to mature students are those with open, non-competitive access for mature students; without restrictive entry requirements based on school performance; with no or low fees; with adequate bursaries for which mature students are eligible; and with lectures or programmes which take the needs and past experiences of part-timers and mature students into account. Childcare, easy access, transferability of credit and enrolment, and the opportunity to study using distance education methods may also be helpful (Fargher & Probine, 1988). On the basis of the above analysis it is now evident that such provision is most crucial for second chance learners.

As the mature student intake changes in composition, the factors which traditionally affect the uptake of tertiary education by those seeking further education and retraining are also changing. As Chapter 8 showed those who now seek further education differ in some significant respects, and in their numbers, from those who did so previously. Previously the majority of those seeking tertiary education as adults were likely to be doing so as one part of their life's activity, alongside other time-consuming parts. In New Zealand in the early part of the twentieth century, part-time students, attended university or adult education classes in the evenings after their daytime employment. In the twenty-first century, which many combine work, paid or unpaid, and study, there are considerable numbers of adults in New Zealand who are studying full-time. Full-time study for adults has previously been rare. And, as the characteristics of adult students change, so the type of provision needs to change to that which will best cater for their needs.

TABLE 10.2 Desirable provision for mature students

RECREATIONAL LEARNERS	SECOND CHANCE	UPSKILLERS	RESKILLERS
General programmes: credentialed or non-credentialed	Bridging programmes, e.g. New Outlook, New Start programmes.	Additional qualifications including specialised targeted courses, e.g. MBA, post-graduate diplomas, short courses	Vocational qualifications through current, research-based courses: undergraduate but especially graduate and post-graduate
Formal or informal formats	Small supportive group teaching	Same support e.g. writing and study skills as for other students. Quality, focused delivery.	Same support e.g. writing and study skills as for other students. Quality, focused delivery.
Delivery at varying times	Delivery in school hours	Evenings, weekends or in employers' time	As for other full-time students
Locations vary	Accessible location	Possible by distance education	As for other full-time students
No special provision ²	Low fees or state subsidy essential	Fees may be paid by employers	Affordable fees access to loans and living allowances
RPL not relevant for uncredentialed learning	RPL	RPL and cross-credit	RPL and cross-credit

Facilitating access for 'second chance learners'

The factors mentioned in the last chapter as significant for mature students are most crucial for those who are entering tertiary education for the first time as 'second chance learners'. The students who need help to become acculturated to polytechnic, or more particularly, university life, are those from educationally disadvantaged groups, including some Maori, Pacifica peoples, and those from low socio-economic backgrounds. They benefit from *New Start* type programmes which provide them with guidelines and help in adjusting to a system which is likely to be alien to them. Bridging courses which provide foundation learning in specific subjects, often science and mathematics, or in literacy and communication skills such as academic writing, may also provide crucial support.

These students, for whom retraining is an initial step, those traditionally conceived of as 'adult learners', will require special provisions which take into account their other responsibilities and which recognises that they are making an initial move to the paid workforce or a return after a period away. Their needs for special provision are different from the needs of mature students seeking retraining through full-time study.

Facilitating access for re-entry women

In the 1970s and 1980s women sought new horizons as their domestic duties decreased but they were still constrained by their responsibilities. Their commitment to seeking further education for themselves was fitted around their remaining obligations. Courses succeeded only when they took account of the facts of women's lives. The courses which were most welcoming to these students acknowledged the time and monetary constraints on women. Such courses were offered during school hours, provided access to affordable childcare, and charged low fees.

The Next Step Centre at Christchurch Polytechnic provides an exemplary case study of such provision. The constraints affecting women students were acknowledged and assistance was provided by the Polytechnic although the extent of the accommodation and assistance offered varied over time. The courses acknowledged that the expectation that women should put the needs of their families ahead of their own is deeply internalised (Martin, 1988)³ by for example their being held within school hours. The provision of childcare for pre-schoolers by the establishing of a crèche at the Polytechnic in 1975 (V.T.C., 1986) marked a significant step in accommodating students who did not fit a traditional mould. In this respect Christchurch Polytechnic was a pioneer; the directors recognised the students' needs long before other institutions provided such assistance.

Initially, when all tertiary fees were low, the cost of the courses was a factor for this group of students because many of the women had difficulty justifying, to themselves or their partners, spending *any* money on themselves. "Even in middle-class suburbs, it cannot be assumed that the adult woman has money to spend freely on her own education" (Martin, 1988). The fees were not a significant financial barrier *per se* until all tertiary education acquired a 'user pays' dimension. Then even comparatively modest rises impacted on women with limited access to finances. Assistance came from the institution in various ways, at different times, and with varying degrees of support. Generally the administration was supportive. At one time cross-subsidising the courses was the response; at another the

strategy was an attempt to challenge the category for education department funding. As institutional funding became more stretched the courses appeared to become a lower priority and the tutors sought outside funding to pay the fees of women who would otherwise not be able to attend. The establishment of these courses as a community education, not as credentialed programmes, no doubt helped the institution to provide student-friendly education. As community programmes, the courses fitted in a lower cost category and so helped the institution maintain the lower fees.

Barriers and provision for upskillers and reskillers

The constraints which such students face are still barriers to many, but not all, mature students in the twenty-first century. The growth of new groups of learners and the need for new provision was foreseen by, for example, Wood:

Enhanced training opportunities, training for the future, and use of training as a Screening device for promotion, all are distinctive from the Fordist emphasis on training for immediate needs and for narrowly-defined task performance.
(Wood, 1989, p. 34)

He further suggested that in the new environment retraining, as part of education and the growing service sector, would take on forms which were new (Wood, 1989, p. 156-7). In the last few years, methods for the delivery of distance education have expanded from the traditional mode of education by correspondence. Niche marketing, provision of specialised courses, individualised programmes, delivery of programmes over distances and using new technology have been added.

The growth in numbers of mature students studying full-time in New Zealand bring a new dimension to the question of provision for mature students. Those who are upskilling are likely to be in employment and therefore studying part-time; those who have decided on a career change and are reskilling or seeking a new direction have, as mentioned in the previous chapter, in a surprising number of cases become full-time students. The group which is embracing lifelong learning is composed of those who have made a commitment to full-time further study, or those who are combining a major commitment to tertiary education with part-time employment. Such students have been in the paid workforce but decided to enter or return to study. What is appropriate provision for their special circumstances may differ from that required by second-chance learners making a more tentative, or constrained, foray into tertiary education.

Entry criteria; financial considerations in the form of the cost of courses, living costs and opportunity costs; and forms of delivery are likely to be the main considerations for those undertaking full-time study. Questions of support and recognition of prior experience may also feature but are less likely to be determining factors as to whether study is undertaken by this group of potential students.

In most countries restrictive entry qualifications affect adults wanting to return to study but in New Zealand the provision of open entry to university means this option is available to them at all but one of the New Zealand universities.⁴ They are eligible to enter arts, science, and commerce faculties. They can compete with other students for entry to courses such as medicine, dentistry, law and engineering for which entry is determined at the end of the first year (although they may be disadvantaged by being less well prepared). Somewhat ironically, entry to more vocational courses may be more limited than to general degrees. Full-time polytechnic courses more often have restricted entry than do university ones because of the limited places available on a course.⁵ Often however the mature student's experience will be of advantage to them when they apply.⁶

Appropriate delivery

For those students whose primary role is in paid or unpaid work and who study part-time, questions of 'appropriate delivery' in terms of time and place and possibly the provision of childcare and transport, are critical in determining whether they can undertake a programme of study. For these potential students, study must fit into their existing lives in terms of time and place. They may be constrained in the extent to which they can travel to study or may not be able to do so at all. They may be able to attend classes only during the day, or evening, or at weekends. Under such constraints they are marginalised but, as societies recognise the value of lifelong learning, attempts are being made to cater for these students by providing 'flexible delivery' of courses, a term often used as a synonym for 'distance education'.

Flexible delivery can encompass a variety of modes of delivery such as off-campus teaching by regular or contract faculty, offering courses at different times, e.g. weekends, or as concentrated short courses. It has become increasingly used to describe education delivered to those distant from the provider, especially by mail or web-based technology. This provision has the advantage of students being able to learn in their own time but is currently controversial because of the belief that institutions and governments are promoting it

because they see it as a low cost alternative to the traditional bricks and mortar university. Debate over whether distance education can really be low cost hinges on whether quality education can be delivered in this way.

In the United States, the National Education Association (NEA) is telling its members that on-line instruction is almost always more expensive than traditional face-to-face teaching.

[Despite criticism] the NEA stands by its findings stressing that 'doing distance education right' and following the principles of quality is not going to be cheap. (AUS, 2001)

The necessary preconditions for such learning appear to be for the learners to be confident and independent learners with access to good support systems. The mode of learning appears to be appropriate for those who are already skilled in learning because they have previous successful tertiary experience, are self-confident and self-motivated and subject to time constraints because of being employed. Distance education which is by correspondence or involves the provision of learning materials via the internet or mass media (radio or television, aural or video systems), will suit these people if they are not seeking social interaction as part of their learning. Such adult students are likely to be upskilling, and to have a clear sense of direction in seeking qualifications with the skills and the motivation to study and complete assignments without much external support.

Distance education

Round the world, distance education is increasingly popular and is seen as offering the possibility of education to many who would otherwise have no chance of tertiary education.⁷ An important pioneer was the United Kingdom's Open University which offers over 100 courses that use information technology links as a central part of the teaching, with 4000 students per day connecting via the Internet. The World Bank envisages it as an emancipatory measure but cautions about uneven quality.

Distance learning has great potential in the developing world, offering a powerful channel for bringing education to groups that have previously been excluded. In the future it is almost certain to take place increasingly across borders. Already over 12 per cent of the United Kingdom's Open University students are resident outside the country. It is also easy to conceive of high-quality developing country institutions offering educational programs and degrees in other parts of the developing world. While a desirable development, this would create a variety of problems relating to quality control and other forms of supervision. (World Bank, 2000, p. 32)

Within New Zealand, as in the United Kingdom and the Netherlands, distance education is increasingly being used by universities and other tertiary educational institutes. There is widespread interest in the capability of distance education to offer lifelong learning to those who cannot attend an institution or who prefer to study in their own time and place. On one hand this kind of study opens opportunities to many who cannot access campus-based forms of education; on the other there are concerns that education delivered in this way could become second class options, taught by underpaid, under-qualified casualised and part-time staff, without research commitments. Education delivered via information technology is promoted more often by politicians and university administrators⁸ and more often opposed by teaching staff. In New Zealand, one of the major proponents, Maurice Williamson, the Opposition spokesperson on Education, predicted that cyber-universities would become like the big name institutions of Harvard and Oxford as quality learning became available over the internet and location became increasingly irrelevant (Rowe, 2000a, p. 5). The Associate Education Minister, Steve Maharey, was more cautious, despite envisaging a 'knowledge society' and lifelong learning which would be example allow "a 45 year old with two children to easily retrain" (Rowe, 2000a, p. 5).

Commentators suggest that the promises of quality education being available to all are unlikely to be fulfilled without extra resources. A recent University of Illinois study found that "high quality online teaching is time-and labour-intensive" and "teaching students online at the same level of quality as in the classroom requires more time and money" (Press & Washburn, 2001, p. 36).

Without the extra input of resources the experience is likely to be inferior to that offered face-to-face and student expectations will be disappointed.⁹ Expectations are high with institutions suggesting that distance learning is 'ideal' for many students, that it is the way of the future and that there is likely to be expansion in the future (Rowe, 2000a, p. 9-10). However cautions are sounded in the results of Australian research. A study at Griffith University found that the most common source of dissatisfaction with the course was 'too little class contact', although a minority described this as the greatest advantage (Lafferty, 1995, p. 6).

John Hinchcliff, AUT Vice Chancellor, claims that "Teachers can no longer expect to be able to regurgitate facts and figures because all that is available in much more exciting ways" (Rowe, 2000a, p. 5) but others suggest that the loss of face-to-face interaction diminishes the educational experience. University of Washington professor of education

Theodore Kalsounis declares, “We feel very strongly that you cannot have a university without interaction between faculty and students. Technology may facilitate that interaction, but it is not a substitute for it.” (Press & Washburn, 2001, p. 36)

Structural contradictions also appear in the nature of the provision. While students expect the material to be supplied, a “heavy reliance on set texts and course dossiers tends to generate a culture of dependence, as well as providing few incentives for the students to develop their own research skills” (Press & Washburn, 2001, p. 37). Distance education can run the risk of becoming distance information unless rigorous standards are applied and active learning required.

“The most frequently used term is that this is a new delivery system,” explains Burbules, [a professor of education at the University of Illinois]. “But that is a poor and narrow description of teaching. It fits the lecture and textbook models, but for most people the enduring aspects of higher education are writing skills, critical-thinking skills, learning to learn. Can seminars, critical dialogues, active enquiry become part of on-line media? None of those things can be understood in a ‘delivery system’ model.” (Press & Washburn, 2001, p. 37)

Such education is marketed as being flexible and able to be accessed by the students despite the constraints of their lives. Given that lack of time is often the major constraint and yet for most students sustained effort is necessary for educational mastery and learning, it is not surprising that disappointment sometimes accompanies the student experience.

In the contentious debate about the ‘clicks and mortar’ universities it is frequently asserted that mature students are the group most likely to benefit from distance education (Lafferty, 1995; Press & Washburn, 2001; Sadlak, 1998). Sadlak suggests that

besides offering an alternative means of getting a degree, this type of studying can be an effective form of providing courses without involving too much of a break from professional employment or time-consuming travel to the campus (1998, p. 103).

For disciplined students with maturity and the ability to manage their time well it can provide opportunities otherwise denied to them, especially if they already have learning experiences to draw on. While distance education students miss out on many aspects of university education that on-campus students benefit from, distance education provides them with opportunities that they would not otherwise have. In this way it is an extension of the ‘massification’ and of the ability of higher education to adapt to the changes that are necessary for any society which either values, or demands, lifelong learning.

The argument that the virtual university is an addition to, not a replacement for, the traditional university is a compelling one and even more attractive is the suggestion of a continuum of educational provision between the clicks and bricks modes of tertiary education rather than dichotomy between the two. However concerns about stratification in education delivery are voiced by educators who fear the consequences for mature students undertaking further education.

“I see this is a class issue” says Carole Fungaroli, a professor of English at Georgetown University and author of *Traditional Degrees of Nontraditional Students*, a book that argues that even adults with families and careers can and should pursue on-campus education. “Who is going to end up in these distance-learning courses? Single moms, working parents – the very people who most desperately need social contact as part of their education experience.”¹⁰ ... [Two] professors of English in the State University of New York system, sound a similar warning. In a recent *Los Angeles Times* op-ed article they suggest that in the future, traditional colleges will train a select group of students in critical thinking and problem solving, “while mass universities will deploy distance learning to deliver low cost content ... necessary to turn working-class students into performers for low- and middle-level jobs in the global economy. Even Levine of Columbia - who likens on-line learning to the GI Bill in its potential to “extend the reach of American higher education” – admits to similar worries. “My big fear,” he says, “is that we will provide personal, highly interactive campuses for those who can afford them. And the rest will be given virtual higher education.” (Press & Washburn, 2001, p. 37)

Massification has extended the advantages of higher education to more people, possibly at the cost of diluting what is previously offered the élite. It now seems possible that the result may be educational stratification which will, in turn, entrench social stratification. If distance education is not sufficiently well-funded to overcome its inherent disadvantages then rather than acting as a democratising agent, on-line learning could facilitate the rise of a two-tiered educational system. If, however, the quality is high and, rather than just information being delivered, education is promoted, then distance learning may prove of benefit to motivated mature students.

Recognition of Prior Learning¹¹

Mature students entering or returning to education and training bring with them life experiences and associated learning unknown to younger students. Through paid and unpaid work experience they have gathered knowledge which may be valuable and equivalent to the learning done in tertiary institutions. Recognition of prior learning (RPL), also known as APL (assessment of prior learning), or APEL (assessment of prior experiential learning), is a process and provision developed to acknowledge this learning formally.

The basic philosophy of recognising the skills and knowledge gained from non-formal learning, paid and unpaid work experience and other life experiences was adopted in New Zealand on the foundation of overseas practice. The process applies mainly to adults as they are most likely to have engaged, whether as a result of employment or unpaid work, in the kinds of activities which result in this learning. It offers mature students the prospect of gaining recognition of their past learning; this is particularly attractive where it will shorten the process of gaining a qualification. The incentive for an individual is that of improving their position in the workplace by gaining credentials. For institutions the incentives are that the process facilitates the entry of adult learners into tertiary institutions.

Recognition of prior learning (RPL) is a concept that has been accepted as part of the educational scene for some time particularly at college level, in the United States. In New Zealand, the impetus came from the increased interest in the gaining of qualifications, increased linking of qualifications and employment, pressure on funds for education, and the establishment of the New Zealand Qualifications Authority (NZQA). Under section 253 of the *Education Act 1989* one of the functions of NZQA has been “to design a flexible system for gaining qualifications with recognition of competencies already achieved” (Fitzsimons & Frater, 1996, p. 9).

RPL has been seen as promoting equity.¹² It provides a way of recognising learning done informally and therefore acknowledges the significance of the life experiences of those who do not usually venture into tertiary institutions (Knapp and Gardiner, 1981; Ekstrom, 1983). Within the policy framework provided by the New Zealand Qualifications Authority, such recognition should have provided easier and more relevant access to further education for upskillers and reskillers. Fundamental to the RPL philosophy is that credit is gained for the learning achieved by an individual, regardless of whether it was gained through work, life experience or study.

Much of the literature from overseas, particularly that from the United States of America, focuses on credit granted for college degrees. This is generally unassigned credit, i.e. not credit checked against the learning outcomes of particular courses but that granted more generally towards a qualification. In contrast, Australian experience points out the need to modularise courses, and clarify learning outcomes in order to acknowledge “the level and quality of learning achievement outside of a formal institution” (Jones, Sharma *et al.*, 1993, p. 64). New Zealand studies which focused on RPL experiences at Polytechnics (Ker, 1993; Coleman, Hopkins *et al.*, 1993; McDougall and Gunn, 1993) suggest, as Ker asserts, “RPL

is complex in practice in spite of the simplicity of the concept". He points out that "if RPL is to be applied to a given course then that course needs to have learning outcomes established with RPL in mind" (Ker, 1993, p. 9).

This was also the finding of a more extensive study undertaken at Christchurch Polytechnic (Kuiper, 1994) which found that in practice there were hidden difficulties in implementing RPL. Within the Polytechnic system it was practicable only to provide credit for learning which could be assessed against the learning outcomes of a particular course. Unassigned credit did not fit within the system. The courses are specific in nature and vocationally orientated so that even in the degree programmes the outcomes are closely related to the requirements of industry. It is difficult therefore to see how the kind of crediting that is done in college programmes in the United States, where unspecified credit is granted for on the job learning so that learning counts for general credit, could apply to a polytechnic course in New Zealand. This raises the suspicion that RPL in this case becomes not the recognition of non-formal learning but rather only recognition of formal learning non-formally acquired. One of the clear distinctions of tertiary education as opposed to that undertaken formally or in the workplace is that the theoretical component is essential. In other words the distinction between *tacit* and *explicit* forms of knowing is critical (Polanyi, 1972). While the recognition of prior learning is well motivated it may be naïve to expect that institutions will willingly recognise learning where the theory is not able to be adequately articulated.

Another finding of the Christchurch Polytechnic study which is applicable to all New Zealand tertiary providers suggests that RPL may not offer as much to those upskilling or reskilling after a period of 'learning on the job' as it initially promised. Not only were considerable reservations about the lack of EFTS resourcing for RPL expressed by those in the study responsible for managing departments, managers were concerned about the consequences of granting credit to a prospective student. The biggest problem anticipated by those responsible for full-time courses was how to cope with the gap in a class and the gap in funding when a student was granted RPL and so not required to take part in, nor pay for, part of the programme.

Because funding is provided for New Zealand institutions on a *per capita* basis and income derives from such enrolments, there are incentives for providers to enroll students for as much of a course as possible. Implementing RPL can provide major problems or even jeopardise otherwise viable courses. It is not surprising that the early promise of RPL as an

equity measure for mature students, recognising their special situations and achievements, has not been fulfilled. While some polytechnics have implemented RPL systems the area is still largely undeveloped. There are still barriers to the recognition of the learning undertaken in employment and the community by mature students. While RPL appeared attractive as a way of granting qualifications without providing the education and training, in practice, unless special funding arrangements are made, such a policy can only be partially implemented.

Not surprisingly, given their traditional emphasis on theoretical learning, universities have been even less ready than polytechnics to offer credit for prior learning. Rather than offering a real opportunity to those with learning gained outside tertiary institutions it appears that the promotion of RPL illustrates the confusion between gaining skills and credentialism. Instead of the skills of an experienced worker being accepted as sufficient there is now a demand that these be credentialised. So rather than the new vocationalism requiring that workers become more skilled, the requirement may be for workers to have credentials before their skills are recognised.

Having looked generally at some of the factors which play a part in facilitating access to study for the mature students, we will not look at how such factors operate in specific locations.

A tale of three cities: Leicester, Utrecht and Christchurch

The provision of education in any location in New Zealand, the United Kingdom or the Netherlands depends on both national and local factors. After investigating the national policies regarding upskilling and reskilling at the macro level in Chapter 9, the next stage is to ask how individual institutions respond. The task is to consider how national policy factors impact on the institutional providers of upskilling and reskilling at the local level.

Methodologically it is clearly not possible to survey every provider in each country. I therefore elected a field work approach in three cities of comparable size and character since my object was to look at the differences between individual institutions in different policy environments, rather than to seek a comprehensive analysis. I was very familiar with the educational institutions in Christchurch. I therefore selected, in the two other countries chosen for investigation, two comparable cities in which I had the opportunity to conduct extensive field work interviews.

The three cities, Leicester, in the United Kingdom, Utrecht, in the Netherlands and Christchurch, New Zealand are of comparable size (approximately 250,000 to 350,000 inhabitants). Each city has education as a major industry and at least one university: the University of Leicester and the newer De Montfort University in the English city, Utrecht University in the city of that name in the Netherlands; and the University of Canterbury and Lincoln University in the New Zealand city of Christchurch. In each, other institutions, both public and private, also provide other forms of post-secondary or tertiary education. The citizens of each city also have access to distance education provided by a national institution and possibly also by one or more local providers.

For the purposes of this comparison the significant features of difference are the differing educational catchments. Both the European cities are centres within large conurbations so that there are many more people living in close proximity to them than in the less densely populated province of Canterbury around Christchurch. In addition, students at the English and Dutch universities are not necessarily local in origin; school-leavers in England frequently move to live in a new place when they enter university while Dutch students often move from home or travel considerable distances on a weekly or even daily basis. These students are, however, school-leavers rather than adults seeking further opportunities with whom this study is concerned. The mature students are likely to be residents of the place where they seek education or training.

In order to evaluate the provision of education and training which is appropriate for lifelong learning it is necessary to keep in mind the three different kinds of adult students introduced earlier in this chapter since some adult learners are tentatively entering tertiary study probably part-time while others wishing to upgrade and update qualification they already have. Some of the variables in this area noted in Table 10.2 (Desirable provision for mature students) will be explored in greater detail here.

In considering provision for adult learners in institutional settings the key considerations appear to be: openness of entry; recognition of previous credentials (transferability) and of prior experience; specialised, targeted courses, e.g. MBAs and post-graduate diplomas; and flexible delivery. It is also important that adult students have access to education of the same quality as do school-leavers. This may mean access to the same courses or to courses of an equivalent quality taught by faculty with relevant qualifications.

Provision in Leicester, United Kingdom

The City of Leicester is one of the largest cities in the East Midlands of the United Kingdom, 99 miles north of London. Like the other two cities, Leicester has a population of about 300,000. Like Utrecht it is a transport hub and, as with the Dutch city, the population is increased by students coming to study. In term time about ten percent of the city's population is composed of students, primarily those of the two universities, and only 18 percent of the student population is from the Midlands. Within 50 miles of Leicester are 14 other universities offering Higher Education. As with the New Zealand city, the provision of educational opportunities in Leicester, the established Leicester University,¹³ the more recent De Montfort University¹⁴ and colleges of further education (of which there are three in the city and others in the surrounding area) reflects that of the country as a whole.

Both universities cater primarily for the traditional undergraduate and, although they both claim to be attracting growing numbers of mature students,¹⁵ these numbers are not only still low but based on a definition of 'mature students', whether undergraduate or graduate, as those over the age of 21. That this is the terminology used by the Higher Education Statistical Authority confirms a significant difference between New Zealand and United Kingdom perceptions. This definition therefore includes a graduate of 22 who began an undergraduate programme at 19 and has continued studying without a break, one who would not be considered a mature student in New Zealand. The Leicester statistics of fifteen percent 'mature' students are skewed by the numbers of mature international students, and the existence of the medical school which many students enter after having completed an initial degree; perhaps ten percent could be United Kingdom students either second chance or embarking on a second programme of study.¹⁶

In addition to the national system of having to gain a 'place' at the university, a further disincentive to the student wishing to return to study could be that, as traditional British degree structures are more subject based than in New Zealand and tend to be progressive, a student who changes track will have to start again at the beginning of a programme. Most retraining takes place at MBA and post-graduate level, sometimes by distance education. In 1995 nearly 3000 students from all over the world were studying through Leicester University for degree programmes such as an MBA in Education or an MA in the Sociology of Sport. United Kingdom students have their fees paid by local authorities but funding levels are decreasing. There is no guarantee of fees or grant funding for second degrees (and students over 50 are not eligible for student loans). It appears easier to upskill by doing

a self-funded Masters, e.g. Master in Journalism for an experienced journalist, than by applying to study for a Bachelor's degree. Post-graduate upskilling at Leicester University is thus similar to that offered in New Zealand through Lincoln University's Professional Masters degrees.

Wider-based programmes are seen in the new universities which are trying to attract students. De Montfort has forged alliances with colleges in order to create 'a seamless robe of progression' and facilitate recruitment. Through its various sites, modular courses and day and evening classes De Montfort aims to provide flexible delivery. Video-conferencing and IT packages are also used. Full-time students must apply through the UCAS, the University Clearing Admissions System, but part-time students can apply directly to the institution and sometimes take the same course. About 10 percent of the over 25,000 students are part-time.

Under the CATS, Credit Accumulation and Transfer System, a student can gain credits which can be transferred to another system, a mechanism which provides flexibility in the absence of the kind of credit transfer system which in New Zealand provides the opportunity for transfer of credit from one comparable course or institution to another.

Mature applicants to both institutions who do not meet the entry criteria will have their qualifications and experience assessed and may be invited for an interview.

Your application will be carefully considered on its individual merits. If you do not meet the general entrance requirements, we will consider your motivation, experience, employment, interests and other evidence that you have the ability to succeed and benefit from the course. (University of Leicester, 1995, p. 28)

Leicester University's offer of part-time degrees through the Department of Adult Education signals that such study is not mainstream as it is in New Zealand¹⁷ although the university does have a mature student admissions officer. Leicester University provides information for mature and part-time students; De Montfort offers courses which can be studied part-time at several different campuses, helping to overcome the problems associated with travel.

Citizens of Leicester may study in distance mode through the United Kingdom University Open University, a pioneer in the field of distance education which was founded by royal charter in 1969. In having no entry qualifications for undergraduate courses, it offers the citizens of Leicester over the age of 18, as those in other parts of the United Kingdom and the European Community, opportunities for study that might otherwise not be available to them. Most students are aged 25 – 45, with the median age for graduation being 34 years.

Most combine study and employment; three quarters are employed full-time throughout their studies. Its method of supported open learning has given the Open University a worldwide reputation.

Arguably the OU has done more than any other [educational institution] to reshape popular attitudes to higher education in Britain. Yet cross-fertilization with other universities has been limited. In terms of research and scholarship, the OU and its staff, have been fully accepted. But, as a teaching institution, the OU has been kept at arm's length and seen as one of a (very special) kind. As a result other universities have dabbled in distance learning, though without recourse to the OU's quarter-century of experience. The OU is exceptional in another respect. Once funded directly by the government, it is now funded by the HEFCE, although it operates throughout the United Kingdom and many other countries. (Scott, 1995, p. 47)

Most of those entering study for the first time are more likely to do so through the further education of community colleges, which reflect the desire of the United Kingdom government to encourage those without qualifications to obtain them. The strong emphasis of these colleges on providing second chance education is manifest in the city of Leicester in the number of programmes offered in this area. *Return to Learn* courses cater for adults returning to study and *Open Access* programmes, which students have to be over 21 to enter, are designed to help adults move on to Higher Education. With *Extended Degrees* the first year is offered at the college in partnership with De Montfort University, with progression to the University for the completion of the course. Open learning centres provide some form of distance education and these programmes aim to cater for the ethnically diverse population of Leicester. Assessment of prior learning is available at this level, but the work accessed has to be current, i.e. acquired in the last two years and the process is costly, because of the amount of work involved in assessment. Evidence of this second chance provision for adults is widespread whereas the universities, in contrast to New Zealand, have comparatively few students over the age of 30.¹⁸

Adult education, liberal arts and community courses are offered by the colleges, the WEA, and Leicester Adult Education College and are therefore quite widely available, but, in terms of government promotion in Leicester, as in the United Kingdom as a whole, the emphasis on training for those who have few or no qualifications is a more noticeable feature. Training and Enterprise Councils play a key role in vocational education in Leicester, as in other areas of the United Kingdom.

Provision in Utrecht, the Netherlands

Utrecht, the fourth largest city in the Netherlands with a population of approximately 300,000, is situated in the centre of the country with its location contributing to its role as a major gateway for rail and as the seat of many international companies. In terms of the number of citizens, Utrecht is similar to Christchurch but the population of the Greater Utrecht area at almost one million means that the city size does not adequately suggest Utrecht's importance as a business nor as an educational centre. The tradition of Dutch students moving from home to study further increases the catchment area for undergraduates. While Dutch employers in general make strong investments in programmes for training their staff, Utrecht has the highest percentage of trained staff in the Netherlands (Universiteit Utrecht, 1994, p. 5). More than 80 percent of the labour force is employed in the service sector, including the wide range of advanced educational institutions which together account for over 50,000 students.

The dominant institution of higher education in the city of Utrecht is the internationally known Universiteit Utrecht, with the Hogeschool van Utrecht playing an important role as one of the largest institutes for higher professional education in the Netherlands. There are also private institutions which provide education, e.g. Delta and Nimbas at the MBA level, and a range of institutions which provide lower level bridging and retraining courses and vocational advice. Employers provide in-house training and the Volksuniversiteit provides adult education as well as basic literacy and numeracy.

Having begun as a medieval bishop's school, Universiteit Utrecht was declared a university in the modern sense of the word in 1636. It has developed into

the innovative, versatile institution of higher education and scientific research it is today, with fourteen faculties and fifty-eight major study programmes in almost all academic disciplines. (Universiteit Utrecht, 1994, p. 5)

As at other Dutch universities, provision of undergraduate courses at Utrecht University is for full-time initial entry students, primarily those up to the age of 27, with no special policy or provision for mature students although a few courses are offered at night. As in New Zealand, increasingly students are employed part-time while studying although, as university education is more elitist, the role of student remains closer to the traditional pattern of full-time study.¹⁹ The 1995 International Audit Report suggested that :

Although some 11% of students are part-timers, their presence does not seem to be considered as an opportunity for change or as one of those areas deserving innovation in order to stay at the vanguard of Dutch Universities.

True, there is not real incentive from the government to develop this field but the university could still select it as a focus for action to be integrated in the development plan, which means prioritisation, i.e., decisions made on a real commitment expressed in terms of *strategies*, that is in terms of the standards applied and means allocated to reach fixed objectives. (Barblan, 1995, p. 14)

The extent of specialisation in employment and therefore also in education and training for employment in the Netherlands means that while transferability of credit is possible in theory it is not common practice. Students attend a university or Hogeschool; moving from one programme to the other requires them to start again. Recognition or accreditation of prior learning is even less an option, certainly in educational institutions:

In general, APL is still in its infancy. Business and industry are hardly familiar with the concept.

The Dutch government is planning to set up on a temporary basis, a national knowledge centre,

to stimulate the use of a system for *identification, assessment and recognition of non-formal learning* in the Netherlands. (CEDEFOP Info, 2000b, p. 15)

The aims include encouraging those concerned to set up their own assessment procedures. It will clearly be some time before those seeking upskilling or reskilling in Utrecht are able to take advantage of recognition of their informally acquired learning.

The Hogeschool Van Utrecht offers a wide range of programmes which have a more applied focus than those at the University and which offer more to the person seeking further education and training. Educational administrator, Drs Hans Hardebol, (personal communication, 15 November, 1995) described its mission as being professional education with three emphases: first, initial education and training, second, upskilling and reskilling and third, service to society at large. Initial professional education is funded by government with a fees component. Upskilling, such as, for example, a course in coronary care for practicing nurses, is done through intensive courses, day or evening, tailored to client needs on a cost-recovery basis. In-service education, such as courses in banking especially organised for Rabobank, can be provided under contract arrangement in the provinces. The Hogeschool staff travel to regions in the weekends to provide the courses 'by distance education'. The bank pays the fees for their employees. This retraining is seen as the employers' responsibility.

The relationship between industry and education has strengthened in recent years through more communication with, and sponsorship by, industry.²⁰ In theory it is possible for an

adult to retrain in a new area but career advice is directive and a student is not permitted to enter an area they are not competent to succeed in. Moreover for such a course the student over 27 will pay full market fees. Government policy is that a person has the right to study *one* curriculum area at the state's expense with a full bursary and full fees paid. After the age of 27 the institution will enroll you but you must pay the full fees. Tertiary education is seen as a public good only for those under 27 but this is balanced people older than 27 by the fact that employers are prepared to invest heavily in education for their employees. This commitment by the employers is the most striking feature of upskilling in the Netherlands.

The Netherlands, a rich society with a highly skilled and knowledge-based economy, is on one hand, more able than New Zealand to provide tertiary education, on the other hand there is less need for the government to encourage upskilling and reskilling as levels of education and skill levels are both very high. Moreover employers take on responsibility for increasing the skills of their workers. If the equation of the level of skills with the strength of the economy holds true, then there is less need in the Netherlands, than in New Zealand, for retraining.

For a student in the Netherlands who is seeking degree study but who is not a school leaver the most obvious way to access university education is through the Open Universiteit Netherlands, an independent government-funded institution for open higher distance education which welcomed its first student in September 1984. The Dutch government's purpose in founding the Open University was to make higher education accessible to anyone with the necessary aptitudes and interests, regardless of their formal entry qualifications (Open Universiteit, 1995)

The Open University charter identifies two further aims: to create a more cost-effective form of higher education, and to encourage innovation in higher education, in terms of both the curriculum and the teaching methods. The Open University offers courses and programmes in law, economics, business and public administration, engineering, environmental science, cultural studies and social science. Enrolment is open to anyone who is 18 years or older. A degree awarded by the Open University of the Netherlands is the equivalent of a degree awarded by a regular university or other institution of higher education. (Open Universiteit, 2000)

The open entry provision was to ensure that Open Universiteit would provide general adult education; instead it has become used mainly for upskilling.²¹ Certainly initially

[t]he Open University was intended to be an alternative institution that would permit adults a "second chance" in obtaining higher qualifications. Yet, almost a majority of those enrolled had already completed a tertiary degree; only

approximately 20 percent are using it as a “second chance” option. In addition most of those who enrolled are employed males, many of whom are sponsored by their employer. (OECD, 1992, p. 53)

The Open University acknowledges this feature and its role as a provider of courses for those upskilling.

Studying at the Open University allows professionals to sharpen their skills. In fact many of its students already have degrees and are taking one or more courses to acquire additional know-how or to retrain for a different occupation. Today, some 68% of the Open University’s approximately 22,000 students are in paid employment, and more than half decided to enroll at the Open University because it leaves them free to choose the time and place of study and lets them progress at their own pace. (Open Universiteit, 2000)

While the Open Universiteit is modeling on the United Kingdom Open University, it reflects the Dutch University system in offering degrees which are subject specific rather than the general degrees of the British system. This makes it possible for students to transfer to another institution of higher education or vice versa (Carleer & van Vilsteren, 1992, p. 186). Other differences apart from the obvious difference in the larger size and the wider range of courses offered by the British Open University, are that the Dutch Open Universiteit offers less in the way of personal counseling and contact between tutor and student and that the courses are shorter and modular so that students can study at their own pace (Carleer & van Vilsteren, 1992). In 2000, *CEDEFOP Info* reported that both the Netherlands and the United Kingdom initiatives to establish digital universities had been launched. In the former a consortium including the Open Universiteit was planned; in the latter country a decision had yet to be made between a free-standing institution or one that acted as a broker. All possibilities seem likely to increase opportunities for those seeking education online (CEDEFOP Info, 2000a p. 11).

Het Utrecht College functions as a community college with a range of vocational and second chance courses to fit with the national aim of ‘Everyone with a qualification’.²² Most of the over 10,000 students are in the age range 18-22 and 90 percent of them are full-time students. The College was a result of an amalgamation in 1996 of those who catered for part-time non-formal education for young people, basic adult education and a college which provides day and evening classes. The provision which would be most likely to impact on those seeking upskilling is that of contact courses, developed specifically for the staff of companies which request and pay for this training. This again demonstrates the tendency of employers in the Netherlands to act as the brokers of that training which enhances the

capacities of employees. The significant features of this provision are that those undertaking the training are full-time employees and part-time students; they are upskilling. Reskilling for career change is not catered for and there is little evidence of it being undertaken.

Liberal arts, non-vocational, non-examination courses, approximately 200-300 a year, are provided for by the Utrecht Volksuniversiteit for about 5000 students; it is thus equivalent to New Zealand providers like the WEA, U3A, and other providers which run community courses but not credentialised education. In Utrecht there are also distinct organisations which provide vocational guidance and bridging courses for women and girls, e.g. BOA (Beroepsondersteuning en Advisering) and second chance education courses for women, e.g. Alida de Jong. The WVTC handbook, published by the Vocational Training Centres for Women (van der Ree, 1994) explains how these schools provide courses when a 'black hole' in the labour market which would provide jobs for women, has been identified and courses are set up in response. The pre-requisites for the courses include: their part-time nature, no longer than a year in duration; low cost; the provision of child care facilities; and easy accessibility by public transport. In this way they cater appropriately for the needs of women returners. Their focus is, however, on preparing women for the workforce rather than for further education.

Investigating the provision of opportunity for those seeking further education in Utrecht reinforces the view that, because the Netherlands is a highly skilled society, there is an emphasis on further training to keep the workforce up to date²³ rather than on the retraining and upskilling that the United Kingdom government for example, emphasises.²⁴

Government policy operates to support a flexible workforce with individuals always looking for marginal opportunities. Upskilling is seen as an area of personal investment, while reskilling for career change is seldom considered as a possibility.²⁵

Provision in Christchurch, New Zealand

In Christchurch opportunities for those wishing to undertake upskilling and reskilling through tertiary education are available through University of Canterbury. Lincoln University and the Christchurch Polytechnic, as well as through distance education, and through courses run at other institutions such as the Christchurch College of Education and the Otago Medical School. Post-secondary education, which can provide a transition to further study, include degree programmes, is offered by other institutions such as high schools and Hagley Community College.²⁶ Christchurch Polytechnic has been a leader in

offering opportunities to those, particularly women, who sought second chance education through its provision of easily accessible, part-time courses. With the addition of childcare and low fees, the barriers to participation faced by adult learners were minimised; with the exception of low fees, these supports remain. At the more basic level, through short courses credentials can be gained incrementally, with modules being added to their NZQA record of learning as the student acquires them.

The features of tertiary education: open entry; the accessibility of part-time study; and general degrees which assist the New Zealand mature student to undertake further study at university, are all relevant to the adult in Christchurch seeking education in order to upskill or reskill. Maturity is an asset rather than a liability for entry to most polytechnic courses and, as will be shown in the next chapter, many full-time as well as part-time students are 25 or older. As institutions have been eager to attract students in recent years, they have become more likely to adapt to the needs of mature students, e.g. the nursing programme at Christchurch Polytechnic no longer insists on students studying full-time.

Both the University of Canterbury and Lincoln University are open to part-time students as a result of government policy. Numbers of part-time students are on the increase. For example, from 1985 to 1996, the percentage of part-time students at Lincoln University grew from 5 to 17 percent. Although the University of Canterbury *Liberal Studies* course which used to provide an entry point for those not prepared to embark on a degree no longer exists, both universities, keen to encourage students, have offered *New Start* courses to provide help for those who have been away from study and evidence is available that shows which students who attend such programmes perform at significantly higher level than adult admissions who do not (ERAU News, 1995, p. 1). While ‘Foundation’ courses are primarily targeted at school-leavers or overseas students without entry qualifications or insufficient language and study skills and so are not of relevance to mature students, the student learning centres at both institutions provide help to many returning students.

Distance education is available nationally through the Open Polytechnic. For over 50 years it has focused on short, vocational courses, delivered by correspondence, catering mainly for those in employment seeking upskilling. The establishment of the National Qualifications Framework has intensified interest in short courses as credentials can be gained in small pieces, although according to the Open Polytechnic Chief Executive, the greatest barrier is the difficulty of getting the transferability of credentials recognised (Shona Butterfield; personal communication, 20 October, 2000). Many (67 in 2000) courses are now ‘web-

resourced'. The aim is to offer "as much choice as possible for the student who is comfortable to work alone". Approximately 70 percent of the students are over 25 years; many have no entry qualifications and thus are essentially second-chance learners who need considerable support. This support is sometimes provided by partner providers such as Barnadoes; in other cases the Polytechnic offers courses for the employees of corporates, e.g. banks, the Customs Department or the armed forces. For those living in Christchurch as in other parts of the country, the Open Polytechnic thus offers one opportunity among others to upskill or reskill.

Enrolment at the Open Polytechnic is affected by the state of employment. In contrast to enrolments at more traditional institutions which react in the opposite direction, when employment rises students move into the workforce and enrol at the Open Polytechnic for part-time courses. When employment falls students move to full-time enrolment at other institutions. "We track with the economy," according to the Chief Executive of the Open Polytechnic (Personal communication, Shona Butterfield, 20 October, 2000). "When it's booming we do well; when it goes down, our numbers go down."

A general (B.A.) degree is now offered by The Open Polytechnic in conjunction with the United Kingdom Open University. Other universities in New Zealand, such as Massey University which as a comprehensive programme, have offered courses and degrees by correspondence for many years. While originally there were restrictions on the extent to which these programmes could be accessed by those within reach of a conventional university, the restrictions have been lifted and the provision expanded both in terms of the number of courses, and also through the use of using internet resources and web-based learning.

Lincoln University has been entrepreneurial in distance education, delivering since 1998 a programme designed primarily for adult learners wishing to embark on some study part-time but who are unable or unwilling to travel to the campus. This group is the mature (24-50 years) group identified by Visser in her research on school-based community education. She found that about fifty percent of the participants were in full-time employment with a further fifth in part-time employment. A large number of these had gained career qualifications previously (Visser, 1999). The Lincoln University correspondence material is supplemented by off-campus tutorials. Similarly the 'Professional Masters' such as the Masters of Property Studies, caters for those who want to supplement their professional activity with study in the same area, illustrating that impetus for the expansion of such

programmes is often career advancement and the gaining of credentials. The programme is “focused on the professional development of people in the workplace”. Delivery is through three ‘contact centres’ rather than on campus, and students are required to have computer access to the Internet. Although education in Commerce, part-time or full-time, is available through the University of Canterbury, Christchurch Polytechnic, and the Christchurch College of Education, Lincoln University is also offering courses with evening tutorials, in the city centre, as opposed to the university campus which is outside the city.

The one area where courses in Christchurch do not meet the criteria of being welcoming for mature students is that of fees and allowances. The question of allowances is a matter for central government and thus essentially out of the control of the institutions. None of the Christchurch tertiary institutions offer scholarships or bursaries for students seeking further study except in so far as these students are eligible for those which are open to all.²⁷

Conclusion

Of the three cities, Christchurch appears to offer greater flexibility and fewer barriers to those wishing to add to their qualifications by attending tertiary institutions, than are faced by the citizens of Leicester and Utrecht. An adult’s entitlement is not limited in Christchurch, not in New Zealand in general, in the way it is in the other two cities and countries. Looking at the interplay between the social policy and action of the providers in the United Kingdom suggests that reskillers are not considered as a client group by the institutional providers. Provision is targeted rather at school leavers and, through government subsidy scheme, to upskillers in the workplace and to retraining the unemployed. A highly articulated system like that in Utrecht could, if social policy imperatives were to favour reskilling, potentially tailor provider programmes specifically for reskillers. But, given that in the Netherlands the accent is on upskilling, providers make no provision for reskillers. Those who wish to reskill do so at their own expense and without providers making any concessions for them. Those in Christchurch seeking further education have access to a variety of programmes and institutions which may provide what they are seeking. Undoubtedly this greater ease of access affects the uptake by mature students. (Like their counterparts in Utrecht and Leicester, however, mature students face financial barriers as we will see in the next chapter.)

State policy appears to affect the provision of avenues for upskilling and reskilling perhaps more definitively than we might expect. Providers are constrained particularly by national

entrance and fees policies. The initiatives which providers take appear to be those which ameliorate conditions for mature students rather than fundamentally altering their opportunities.

In studying education for occupational change, the perspective of the students who undertake this type of study is crucial for an understanding of their motivations and experiences. Chapter 11, the final substantive chapter, focuses on the students themselves, reporting on their motivations and experiences in taking up the available opportunities for education for occupational change.

Notes

¹ As I came to the end of this study I met a couple who strikingly exemplified this new manifestation of the mature student. They were in their late thirties with two children. Both had been previously in the workforce but now were full-time Ph.D students. (They managed this financially because of earning from a period in the Gulf States.)

² The availability of such education is a mark of a civilised society. However access to it may be restricted by 'user pays' provision. The fourth report of the Tertiary Advisory Commission suggests that it should be subsidised (TEAC, 2001, p. xiv: Recommendation 11).

³ In contrast, ACCESS courses offered at the same institution were full-time so that while students in the Labour Department-funded Access courses were advantaged by being paid for attending, those who had child care responsibilities faced unenviable and conflicting demands on their time.

⁴ Demand for entry into Auckland University is now such that all faculties have restricted entry and open entry in the traditional sense no longer applies. Students have however less restricted access to another university in the same city.

⁵ Because of the need for practical work and the provision of equipment for this, places are limited in, for example, engineering courses, whether at university or polytechnic. Many more polytechnic than university courses have this practical component and thus more polytechnic courses have limited numbers of places.

⁶ This is relevant to, for example, mature students applying for degree programmes in nursing or broadcasting. Their experience may not be recognised for prior learning but it is likely to be an advantage where entry is competitive.

⁷ The world's ten largest distance education institutions are Anadolu University, Turkey, with 578 000 students; China TV University: 530 000; Universitas Terbuka, Indonesia: 353 000; Indira Gandhi National Open University, India: 242 000; Sukhothai Thammathirat Open University, Thailand: 217 000; Korean National Open University: 211 000; National Centre for Distance Learning, France: 185 000; the Open University, Britain: 157 000; University of South Africa: 130 000; Payame Noor University, Iran: 117 000 (World Bank, 2000, p. 32).

⁸ Arthur Levine, President of Teachers' College, Columbia University prompted a heated debate with his *New York Times* Op-Ed article prediction that information technology may soon make the traditional bricks-and-mortar university obsolete (Levine, 2000).

⁹ For example, two Christchurch mature students who had experienced distance education in different programmes with different providers expressed typical reservations. One was concerned at “the lack of recognition of herself as a learner” and in the quality of the programme and the other expressed distress at “the difference between that promised and that delivered” (personal communications, May, 2001).

¹⁰ Carole Fungaroli’s discovery that “most of the students I talked to were discouraged by their isolation”, was reinforced for me by discussions with a tutor for a course in law being taught by a New Zealand university through distance education to police officers on the job. She commented on the particular difficulties faced by those who were in isolated stations where they could not discuss their learning with workmates. Those who shared the learning experience with others were much more positive about the experience and performed better.

¹¹ The information in this section is based on a research project undertaken in 1993-4 for the Academic Board of the Christchurch Polytechnic. This study investigated the most appropriate way of implementing RPL at Christchurch Polytechnic. Interviews were conducted with Heads of Departments, tutorial staff, allied staff and students already involved with the process. An invitation to staff members to apply to be assessed for RPL resulted in 32 applications. Applicants were interviewed and where applicable their applications were processed and their learning assessed. A system for assessing the recognition of prior learning was established based on the research findings.

¹² For some groups, such as NZCEW in its submission on the Establishment of the NZQA Framework, it was a significant reason for believing the new system would increase equity in educational provision.

¹³ University College, Leicester was founded in 1921, gaining a royal charter and becoming Leicester University in 1957.

¹⁴ De Montfort University, before 1969 a college of technology and then a polytechnic, is now a distributed university with three campuses in the city and three others at Milton Keynes, Lincoln and Bedford.

¹⁵ In 1995 both universities claimed 15 percent of their enrolments were of mature students.

¹⁶ Personal communication, K.E. Williams, Academic Registrar, Leicester University (5 November, 1995).

¹⁷ Janet Graham, Leicester University (personal communication, 5 November, 1995) confirmed that only these courses, offered through Vaughan College, are specifically for part-timers. Otherwise part-timers may attend full-time courses, if there is a place for them. Part-time students can apply directly to the university but “have to fit in”. The comment by Kathy Williams that “Some

universities have to take what they can get,” reflects the interest in recruiting mature, distance and part-time students currently observable in many New Zealand tertiary institutions.

¹⁸ Those whom I interviewed generally assumed that in talking about retraining I was referring to programmes for the unemployed. The concept of student returning to study full in order to change careers was one they approved of in principle but had difficulty in conceptualising in practice.

¹⁹ Drs Yvonne Thijssen, trainer/Projectleider, Entrelaan, Utrecht, (personal communication: 21 November, 1995) suggested that at this date 60 percent of students had jobs during the year, compared with 30-40 percent at the same stage in earlier years.

²⁰ These comment are based on an interview with Drs Hans Hardebol, Beleidsmedewerker Onderwijs, Hogeschool van Utrecht, 18 December, 1995 but are also supported by other interviews and observations.

²¹ Personal communication: Dr A.M. Versloot, Vakgroep Onderwijskunds, Universiteit Utrecht, 20 November, 1995.

²² I am grateful to Sonja de Vries, Adjunct Directeur at Utrecht College for this information both in written form and in the form of personal communication.

²³ Drs Emmie Peters (personal communication, 25 October, 1995).

²⁴ “Britain has given a lot of attention to encouraging adults to participate in tertiary education. They are targeting people who have previously not participated.” (von Dadelszen, 1999, 9.[2])

²⁵ This observation, which was voiced by an unnamed spokesperson at the Arbeidsbureau Utrecht, was supported in numerous interviews by those familiar with the local situation.

²⁶ “Part-time classes at Hagley Community College provided a good transition to tertiary study, while the university had a good range of support mechanisms.” Interview with returning student, Maureen Titheridge by Tama Moiser, in *The Press*, Christchurch, (Moiser, 2001).

²⁷ Returning women students are eligible for the national awards for women, students recently established by the New Horizons Trust.

Chapter Eleven

Learners for life

The purpose of an adult education worthy of the name is not merely to impart reliable information, important though that is. It is still more to foster the intellectual vitality to master and use it, so that knowledge becomes, not a burden to be borne or a possession to be prized, but a stimulus to constructive thought and an inspiration to action.

R. W. Tawney (1953)

The lottery theory is for people to hope that education buys you a better future. Many subscribe to this and it sometimes works.

Dr A.M. Versloot, Vakgroep Onderwijskunde, Universiteit Utrecht, 1995

I've got five jobs if you count parenting and I'm also working as a volunteer and retraining. I've got two jobs at the TAB, one regular and I help out when they are busy. I do geriatric nursing at night and also shelving library books. I am aiming to be a librarian which will require me to retrain. I hope to do it by correspondence because I've got six children.

Zoe, a participant in a 1994 New Outlook course, reporting at a follow-up session, six weeks after the completion of the course

As we have seen in Chapters 9 and 10, both New Zealand and international statistics (e.g. NZVCC, 2000; OECD, 1998) confirm observations and anecdotal evidence which suggest that New Zealanders are returning to study in large numbers. In international terms the number of women and men in New Zealand undertaking lifelong learning at tertiary institutions is surprising. This chapter looks more closely at those who have embarked on this process to see what can be discovered about their participation in it.

Previous chapters have proposed that in New Zealand women were pioneers in the uptake of retraining. New Zealanders also appear to be among those pioneering a new stage, the

uptake of full-time study for occupational change at tertiary level. The investigation in this chapter covers the characteristics of mature students who have been undertaking further education and training in New Zealand, their motivations for returning to study, the lifestyles they engage in, the levels of support available to them and the costs they face. The reasons they provide for undertaking further education are examined in order to investigate the hypothesis that, in New Zealand, individuals frequently undertake retraining on their own initiative.

Quantitative information has been obtained from a survey of adult students and from the Time Use survey (Statistics New Zealand, 2000) commissioned by the Ministry of Women's Affairs and conducted by Statistics New Zealand.¹ Case study examples are used as illustration. Statistical information (e.g. NZVCC, 2000b) and that available as the result of other studies (Blaxter & Tight, 1995; Lafferty, 1995; Schuller, Raffae, Morgan-Klein & Clark, 1999) has reported most often on university students. Gobbi (1998) analyses the results of a survey of New Zealand adults outside the formal education sector, who undertook education and training in-house, external training or structured formal training.² The survey reported in this chapter complements such information by focusing on mature students at the Christchurch Polytechnic and uses its findings to check against what we know about lifelong learners in New Zealand. Some comparisons are made with the findings of a study by Schuller, Raffae, Morgan-Klein & Clark (1999) who raise insightful questions about 'second chance' education in their study of students in a variety of educational settings because such a comparison provides a useful reflection on the New Zealand situation.³

The Polytechnic study

Christchurch Polytechnic, now known as Christchurch Polytechnic Institute of Technology (CPIT), was chosen as a tertiary institution which is primarily involved with vocational training.⁴ It offers mature students a wide range of courses from, for example, the Next Step Centre courses which cater for second chance learners, to those in which are enrolled degree students, men and women, with a variety of backgrounds and aspirations. The essential nature of polytechnic education is that it is a mixture of theoretical and practical learning.

The aim of the survey was to provide a snapshot of mature students at such an institution. Although in other countries students over twenty-one can be regarded as 'mature students' and New Zealand policy treats those twenty-five and over as financially independent of their

parents, for this study those over thirty were selected as the target group so that the respondents would have life experience which was likely to include training and employment.⁵ (Appendix B1 covers the administration of the survey.)

Methodology

The questionnaire (see Appendix B2) asked 25 questions. Students were questioned about the course they were enrolled in and also about their personal circumstances because information about age, gender and dependents is a key to assessing the characteristics of those who take up retraining.⁶ Gender was included as a variable in order to check whether, for this group, retraining was still predominantly a female activity. Gobbi suggested of women in employment that “Female workers had a slightly higher participation rate (48.6 per cent) in education and training than male workers (48.0 per cent)” (1998, p. 114) although the difference Gobbi notes seems inconsequential. Previous educational and occupational history and current lifestyles were checked by asking about occupational history, i.e. previous work and training and the main activities in which the respondents were currently engaged.

While a postal questionnaire can provide limited information about motivation, of central importance was the investigation into whether the respondents anticipated a change of career or were studying primarily ‘for interest’, i.e. whether they were concerned primarily with skills and credentials or whether their motivations were in the tradition of liberal adult education.

Finally, questions relating to fees and whether they received any financial support aimed to assess the extent to which financing retraining was their personal responsibility and the result of their own initiative. An open-ended question gave the respondents a chance of comment on the level of fees.

Part-time and full-time students

The two phases of the study focused first on full-time, and then on part-time, students. Although full-time courses were seen as most likely to contain those who fitted the ‘retraining’ category in the sense of education for occupational change, both full-time and part-time students were surveyed in order to ensure the inclusion of students who were upskilling and reskilling. Those most likely to be studying towards a career change (reskilling) are more likely to be in full-time courses whereas those in employment are more

likely to be improving their skills for their current employment (upskilling) and studying part-time.⁷

It was also necessary to distinguish between different groups of part-time courses. Part-time courses like those for teaching language, or like ‘personal development’ courses, or those in trades-related hobby areas like woodturning, are most often taken out of personal interest, rather than as preparation for employment. However, even with courses which are intended as vocational, it cannot be assumed that all of those attending are doing so for vocational reasons.

The survey thus covers mature students who have made a decision to study either full-time or part-time, instead of, or as well as, being in paid employment. These students may also be combining family responsibilities with study and work. As will become apparent, the majority are undertaking study for vocational purposes. Where they have previously been in paid work, or have had previous training, this means they are ‘retraining’, whether in the sense of upskilling or of reskilling. For this reason, the results will sometimes be presented for the total sample and for the full-time and part-time groups. At times it will be pertinent to focus on those studying full-time and at others to note the results for the full-time *and* the total student samples.

Selecting the survey samples

Selecting the students to question involved identifying appropriate samples of full-time and part-time students and led to the first finding: there were significant numbers of students over 30 enrolled at the Polytechnic.⁸ Of the total Polytechnic enrolment at the time of the survey, almost 25 percent, over 4,000 of the 17,000 students, were aged 30 years or more. Of these, 259 were full-time and the majority, 3851, were part-time students.

A sample was selected (see Appendix B3) of students who fitted the criteria of being full-time, full-year students over 30 years of age. A disproportionate stratified random sample with a total sample size of 105 was produced from the full-time student group⁹ with a maximum of three students being chosen from any course. The part-time sample of students of 30 years of age and older excluded non-citizen permanent residents and ‘hobby classes’ (defined as those courses which were non-assessed and obviously non-vocational). In order to obtain a sample of comparable size with the full-time group, the decision was taken to include all those students in these courses who had their birthdays in the first seven days in the month, resulting in a sample size of 195 students.¹⁰

Gender was not a variable taken into account when initially selecting the sample except that there was an awareness that sampling a maximum of three students in any full-time course could, because of the large numbers enrolled in nursing programmes, affect the proportions of women represented by under-representing them. Because gender is likely to be significant in an investigation of education for occupational change it was important to check that the proportions of women and men in the sample were comparable to the proportions in the total Polytechnic student population. The random sampling had produced proportions (male 44 percent; female 56 percent) in this group comparable with the ratios in the full-time student body (male 40 percent: female 60 percent)¹¹ and with proportions of the 538 students who were full-time for part or all the year (male 40.15 percent: female 59.8 percent). In the part-time sample, as in the total part-time student group, the gender mix was slightly more biased towards women with a ratio of male 28 percent: female 71 percent.

Administration and response

For a sample of this size where names and addresses were available, a postal questionnaire was an appropriate method.¹² Seventy-five replies (a response rate of 71.4 percent) were received from the full-time group and 139 replies (a response rate of 71.2 percent) from the part-time students.¹³ The high total response rate of 214 questionnaires from the 300 posted (71.3 percent) may reflect that the topic was of strong personal concern to those who took part in the survey. Many replies were supplemented by a page or more of comments. Overall, the gender ratio of the replies was not dissimilar to those of the sample groups (male 33 percent: female 66 percent).

Characteristics of the respondents¹⁴

Age

International comparisons of the age distribution of tertiary level graduates support the contention that New Zealanders continue to study or return to study at older ages (OECD, 1995, 1998). According to the 1998 OECD report:

[i]n New Zealand as in Sweden, ages are high at median and 75th percentile particularly for second university degrees and non-university tertiary programmes. (OECD, 1998, p. 28)

In this survey, the majority of the full-timers (40) and a third of the part-timer respondents (48) were in their thirties. The grouping of the full-time respondents in their thirties was shown by the fact that 40 were in the 30-34 age group and 17 were 35-39 years. There were also, however, 17 (24.3 percent) aged between 40-49 and one (1.4 percent) was 50 or over. Part-time study attracted eleven students in the over 50 age group. Over the total sample 88 (41.1 percent) were in the 30-34 age group, 54 (25.2 percent) were 35-39, 60 (28 percent) were between 40 and 49 and 12 (5.6% percent), all of whom were women, were 50 or over. These findings are congruent with statistics which indicate the older ages of New Zealand students.

The pattern is confirmed by the 1999 New Zealand Vice Chancellors' Committee Report.

One of the most significant findings on which the 1999 report is based is the fact that [the] average age of New Zealand university graduates is increasing. This would appear to indicate that greater numbers of more mature students are enrolling while their younger counterparts are taking longer to complete their qualifications. The average age of respondents is 29, an increase of a year on the previous survey. ... The trend to lifelong learning shows up in the report in the number of graduates who are aged 40 years or older. In the previous survey this group constituted 11.7 per cent of all graduates but that proportion has now increased to 13.8 per cent. The report details that graduates aged between 30 and 40 make up 16.6 per cent of the population for the most recent survey whereas the equivalent proportion from the previous survey was 15.1 per cent. (NZVCC, 2000b, p. 28)

Older students have become an important population in New Zealand tertiary institutions and this trend appears to be a continuing one.

Occupational and educational history

Most of the respondents already had some education and/or training when they started their Polytechnic course. The majority of those surveyed (N= 57: 76 percent of full-timers; N= 177: 82 percent of the total) had had job training since leaving school with a great range of occupational areas cited: nursing, soldiering, fitting and welding, printing, teaching, flax-weaving among others, although this training was not necessarily in the area in which they were currently working.

The range of educational qualifications was wide, from those (N= 17: 27 percent; N= 21: 9.8 percent) who gave no answer or said 'none', to those (N= 7: 9.3 percent; N= 21: 9.8 percent) with degrees. There was a fairly even distribution among the rest between those with school or sixth form certificate, those with University Entrance or Bursary, and those with a Certificate or Diploma and not much difference between males and females in their

educational qualifications. Males were slightly more likely (88 percent) than females (79 percent) to have undertaken post-school training. This group were therefore not primarily 'second chance learners' as the pioneer women discussed in Chapter 8 frequently had been. Rather these findings reinforce the suggestions made in Chapter 4 that adult New Zealanders are undertaking lifelong learning, fitting in periods of study along with employment and family life.

On the basis of their findings that a large proportion of respondents had already obtained higher education qualifications or part qualifications, Schuller *et al.* argue that in the United Kingdom the rhetoric of 'second chance education' which is often used in connection with mature study "ignores the diversity of part-time higher education and the extent to which different education episodes, both at higher education level and below, may be progressive and cumulative experiences" (1999, p. 133). This diversity may be even more marked in New Zealand where such rhetoric is now less frequently heard, perhaps suggesting there is a growing awareness of the range of students and their experiences.

A New Zealand department comment on government statistics acknowledges, "Tertiary education is not simply a follow on from secondary school. A significant number of students now begin tertiary education after being in the workforce or unemployed" (Labour Department, 1999, p. 8). While the Labour Department reported that the majority of university students (58 percent) went directly from secondary school, 20 percent had, in their previous occupations, been wage or salary workers or self-employed. For polytechnic students the situation was more closely balanced with 30 per cent being previously employed while only 29 percent came directly from school. Fourteen percent were recorded as previously unemployed (Labour Department, 1999, p. 8).

Lincoln University examples provide further evidence of this trend. In 2001 37.1 percent of students were 'mature', i.e. aged 25 or over.¹⁵ In a second year university class of mainly commerce students¹⁶ 16 out of the 30 students had returned to university after working full-time. Twenty-four were currently employed. All of the students, whether previously or currently employed, were intent on improving their prospects in the workplace. Some examples from this group serve to illustrate the diversity of experience and intentions.

One student had worked as an assistant accountant with a B. Com. before becoming a professional rugby player. He returned to study in order to make the transition to a career in the human resources field. Another who had an initial degree in physical education had been employed as a teacher and a professional sportsman. He intended to seek a business

management position. A third mature student who had, after a secretarial course, been employed in this area, enrolled in a commerce degree in search of “more interesting work and being better treated”. She would seek employment in the area of applied computing. A former musician had abandoned his degree first time for a career in music and film but returned to university to study computing. A single parent, after working as a road safety co-ordinator, had been awarded a scholarship to study transport. An accountant engineer with eight years experience in South African mines was retraining to work in human resources.

A postal employee, having noted his contemporaries with degrees were getting promoted more quickly, returned to study, a decision which resulted in his deciding to pursue a new (then undecided) direction. A Justice Department employee noting the same tendency made the same decision. He believed a degree would “stand me in good stead when I set up my own business”. A student with ten years experience in the hospitality industry decided to add qualifications to his management experience. A student with a South American degree wished to add a New Zealand qualification and refine her English to an appropriate level for commerce. A mature student from Bosnia had entered university in New Zealand without qualifications but was studying computing with outstanding results.

Another example of changing direction was a Lincoln student with a previous degree and experience in information technology who returned to university to study psychology at masters level at the age of 40, motivated by what he termed “the inexorable movement to specialisation”.

Gender, dependents and participation

In the Polytechnic survey, in every age group as in the total sample, the number and proportion of females who responded was greater than for males, meaning that there was a slightly higher response rate from the women.¹⁷ For many, study was combined with family life. The majority (N= 127: 59.3 percent) of the total sample) were married or living with a partner, outnumbering those who were single (N= 44: 20.6 percent), or separated or divorced (N= 36: 16.8 percent), while three were widowed and one chose the option of 'other', giving her status as lesbian. Twice as many (N= 143) were parents than not (N= 71: 33.2 percent), with 29 (13.6 percent) having one, 69 (32.2 percent) having two, and 45 (21 percent) having three or more children.

As we have seen, gender has been a significant variable in retraining, primarily because women, as a result of their out-of-the-workforce status in the past, were in a position of wanting and needing to retrain in order to re-enter the paid workforce. That gender is still a significant variable is confirmed by the high proportion of women in the survey sample. This is particularly noteworthy, given that the full-time sample under-represents the number of women over thirty enrolled in full-time, full-year courses. It is therefore worth investigating further the implications of the preponderance of female respondents in the group retraining full-time. The women tended to be older than the men, with 18 (42.9%) women being under 35 years, and 24 (57.1%) over that age, whereas 22 (66.7%) of the men were younger than 35 and only 11 (63.3%) older.¹⁸ When the existence of children is considered we note that more males (N= 17: 51.5%) than females (N= 15: 35.7%) had no children, no doubt partly because the men were younger on the whole. Whereas 16 (N= 48.5%) of the 33 men had one child or more this was true for 27 (N= 64.3%) of the 42 women.

This suggests that for men, growing older and having children may be less compatible with retraining than being younger without dependents, while for women a period spent primarily in child care provides an opportunity to study. This may be the catching up by 'second chance' learners on educational opportunities missed earlier or the chance to extend their education. Chapter 8 illustrates that a period out of the paid workforce bringing up children has been used by many New Zealand women also as a time to study and acquire new skills. It may even be that women are advantaged in having opportunities to undertake retraining (although any such contention should also take into account any disadvantage in first chance education and training). The presence of children may be a positive factor rather than a deterrent for women as it sanctions the use of time spent out of the workforce. My experience of the Next Step Centre courses and my personal observations support the contention that in New Zealand, as probably in other countries, the role of mother/housewife has provided opportunities for 'education as a life choice', an opportunity less open to those who see themselves as earners and providers.

In contrast, a Scottish study found "[s]lightly more males than females had dependent children, suggesting that women with dependents were more likely to be deterred from studying" (Schuller *et al.*, 1999). The greater availability of part-time education in New Zealand may well be significant for the proportionately greater uptake of further education by New Zealand women with dependents.

The finding that more women than men have their fees paid for them and that this payment is linked to the parent and welfare recipient status of those receiving the Domestic Purposes Benefit provides further evidence for this contention. In this particular it may be that there are advantages in being female and that being a beneficiary may provide greater opportunities for retraining than would otherwise be available. There is congruence here with Government policy where it aims to assist women into the paid workforce by enabling them to enrol in education and training programmes.¹⁹

Lifelong learners?

The hypothesis that studying full-time would be more significant for retraining, particularly reskilling, was borne out by the findings in terms of hours spent attending classes and whether the respondents were working towards a qualification. The findings of this study showed that the two groups of students differed in their commitment of time to work and study. Not surprisingly, almost all of the full-time designated group respondents (N= 74: 98.6 percent) identified themselves as full-time students; the one who did not explained she was doing a half-time course plus some other courses and so, presumably, classified herself as not being enrolled in a full-time programme. Some (N= 14: 18.7 percent) were in class between 6 and 19 hours a week but the majority (N= 61: 81.3 percent) attended for twenty or more hours each week. All stated they were working towards a qualification.²⁰ These are the students who were fully committed to their study as their main activity.

While most of the full-time respondents (N= 59: 78.7 percent) chose studying as their main current activity and said they did not spend any time in paid work, there were a number (N= 7: 9.3 percent) who chose childcare or domestic responsibilities as their main (paid or unpaid) job and eight (10.7 percent) who said they divided their time equally between being a student and childcare, or between studying and paid work. One, who explained he had his own business, gave paid employment as his main activity and said that he spent more than thirty hours a week on this.

The large majority (N= 102: 73.4 percent) of the part-time students attended fewer than five class hours a week. Twenty-eight (20.1 percent) attended between 6 and 19 hours indicating they spent a more significant proportion of their time on study, and seven (5 percent) replied that they attended 20 or more hours a week. Most (N= 115: 82.7 percent) stated they were working towards a qualification. Some indicated that they were studying in order to qualify for entry to a course of study such as nursing. For those who had been enrolled nurses, this

was a move to upskill and gain the new credential. One declared her motivation was “to turn a ‘gut feeling’ into ‘professional judgement’ ”and “to gain more credibility with my peers, managers and sub-ordinates”. More than two thirds of part-time students (N= 108: 77.7 percent) gave paid employment as their main activity, with only four (2.9 percent) of them defining themselves as students and 14 (10.1 percent) in terms of their child care responsibilities.

Overall therefore the majority of all of those surveyed (N= 109: 50.9 percent) considered paid employment as their main activity while fewer (N= 63: 29.4 percent) currently described themselves as students, particularly those who were enrolled part-time. In each group some (N= 21: 9.8 percent overall) gave childcare as their primary responsibility.

Portfolio lifestyles: combining work and study

The changes in employment patterns referred to in Chapter 4 suggested that serial and concurrent employment and study are replacing permanent employment for many people. New ‘non-standard work patterns’ are anticipated by the Department of Labour in its *Workforce 2010* document (Department of Labour, 2000, p. 11) as being likely to increase in provision and demand. Portfolio careers are those where different types of employment feature in a person’s life, concurrently or sequentially. They are the employment-related part of a portfolio lifestyle.

Portfolio lifestyles are further complicated because they include non-work components. These new patterns link with the proposition in Chapter 9 that being a student is no longer a separate, distinct period of transition between school and adult responsibilities in which the student is somewhat apart from the rest of society. Engaging in tertiary study is now more and more frequently combined with paid work or family responsibilities by those of all ages. Portfolio lifestyles are lived by many students who earn and learn concurrently. The already complex relationship between employment and tertiary study has been further confused by the changes in employment patterns including the increasing number of part-time jobs and career changes.

Portfolio careers are often sequential. The acceptance of this is illustrated by the opening statement of an article in a Christchurch newspaper on “how technology has changed for good the nature of the employment market”.

No-one would raise their eyes at hearing about the office manager who was made redundant by a large company, had a go at selling real estate, and is now working with computers. (Crean, 1995, p. 5)

Study in order to reskill may also be part of this mix, with one type of employment succeeding another and leading to career change.

The NZVCC graduate employment survey provided figures supporting evidence of these trends and comment on the mixed destinations of 1999 graduates.

Of all respondents to the survey, 55.8 per cent are in full-time employment (1998, 58.2 per cent) while 29.3 per cent are undertaking further full-time study (1998, 26 per cent). It is important to note in this context that many respondents report more than one destination, for instance part-time employment and part-time study. (NZVCC, 2000, p. 29)

This combining of study and work, paid or unpaid, illustrates the permeable nature of the boundaries between different life activities. Instead of study and (paid or unpaid) work being sequential they are frequently combined and many combine study with one or more jobs. The portfolio career may even be concurrent, rather than sequential, with study being combined with one type of employment and then another, or even combined with two different types of employment at the same time.

Bridget exemplifies this mix. With seven children she is familiar with the demands of a life which combines study and work, paid and unpaid, in varying ways. While attending a *New Outlook* course she was attracted to university study during a visit to the University of Canterbury campus. She first attended a *New Start* course and then enrolled in the *Certificate of Liberal Studies*. She was then employed in a school office until deciding on the *Certificate of Social Work*. During an associated period of field work in a social service agency she decided to enrol for further qualifications and began study for a Social Work Diploma. She had thus at one period combined part-time study with childcare, at another part-time study, employment and family responsibilities and later she returned to full-time study.

Some age-related patterns are revealed by the Time Use Survey (Statistics New Zealand, 2000). As New Zealanders age, patterns on time spent in education and training change and gender differences emerge. For young New Zealanders, combining work and study is common for those who are primarily students but not for those in full-time work (Statistics New Zealand, 2000). On average, according to the Time Use Survey, young people in full-time work spend very little time on education and training, including training that takes

place in the workforce. Students, on the other hand, are likely to be in paid employment in term time; nationally 91 percent of them were working at least some hours a week in 1998 according to the Vice Chancellors' Committee survey (NZVCC, 1999).

In 2000, 88 percent of Lincoln students answering the University's satisfaction survey declared they were employed (Lincoln University, 2000), 51 percent of them less than ten hours a week, 21 percent between 10 and 20 hours a week and 16 percent more than 20 hours a week during term time. Only 11 percent of students responded that they were not in paid employment, a similar finding to the national study which found only nine percent were not in paid employment (NZVCC, 1999). Students are subject to conflict by the demands of paid work and study as is shown by the fifty-six percent who agreed or strongly agreed that "I would be more successful in my studies if I did not have to spend as much time employed during term time as I do" (NZVCC, 1999).

Of the full-time students in the Christchurch Polytechnic study two thirds did no paid work at this stage of their lives, reflecting perhaps that many were combining study and childcare before (re) entering paid employment and thus were engaged in a lifestyle in which study and unpaid work featured concurrently, and paid employment sequentially.²¹ This sequential employment might also be combined with childcare or further study.

The Time Use Survey reveals gender differences and changes from younger age groups in the ways time is used after the age of 25.

In this age group, about 6 percent of women's surveyed days and 4 percent of men's recorded time on education and training. Overall, those who already had qualifications were more likely to participate in education and training than those with no qualifications. However, women without qualifications are more likely to be in education and training than men without qualifications. (Statistics New Zealand, Time Use Survey, Education Results: 2000)

These statements support both the themes of the already privileged as being the recipients of more education and the predominance of women among 'second chance' learners.

Moreover,

[P]eople aged 25 or over who participated in education and training spent an average 3.1 hours per day for men and 3.9 hours for women. This suggests those from the age of 25 undertake education and training in sizeable blocks of time. These blocks of time are bigger for those not working, or working part-time, compared with full-time workers. (Statistics New Zealand, Time Use Survey, Education Results: 2000)

International and New Zealand surveys (Ministerial Consultative Group, 1994) also suggest that women are more likely to return to education and those already educated are more likely to be over-represented in tertiary education.

Choosing to study

The responses of the mature students who were surveyed reflect the responses of individuals to the changing nature of employment in the area, as reported by a Christchurch newspaper:

Employment in Canterbury has been characterised by change. Until the 1980s, people tended to stay in one type of occupation for 30 years ... workers at the turn of the millennium tend to remain in a job for an average of only seven years. ... Canterbury Development Corporation chief executive Chris Pickrill says, within a few years more than half of the jobs in Canterbury will be in “entirely new industries”. This has major implications for education and training. People will need to be increasingly flexible and adaptable he says. Work and Income New Zealand regional commissioner Bruce Ash agrees: “Career changes will necessitate ongoing training, and perhaps retraining, at all stages of life to accommodate the needs of the future employment market.” (Crean, 1995, p. 5)

The factors which have led to increased interest in tertiary study for adults are both vocational and leisure centred and the process of distinguishing between which of these motivations is primary is difficult.²² It is often impossible to distinguish whether the motivation is one, the other or a mixture of motivations. Disentangling the factors which lead an adult to make the necessary sacrifices which returning to study entails is difficult to do for one individual; it is even more difficult to generalise about the motivations of mature students in general.

In the survey of Christchurch Polytechnic students, a forced choice question on motivation required the students to declare whether they had chosen the course primarily in order to gain skills and/or qualifications or primarily out of interest. Although two respondents were unable to decide between the options given and opted for both, overwhelmingly the respondents chose the acquiring of skills and/or qualifications as their reason for enrolling. This was true for 70 (93.3 percent) of the full-timers, 122 (87.8 percent) of the part-timers and 192 (89.7 percent) of the total group. Three full-time students (4.3 percent)²³ and 11 part-timers said they were studying primarily for interest.

If leisure is classified as non-productive leisure, productive leisure, household production time and pure leisure (Golden, 1993, p. 204), then “activities intended to promote higher future earnings prospects” such as increasing one’s credentials in order to get a better job would count as ‘productive leisure’. Studying for personal, intellectual enjoyment would be

more likely to be considered 'non-productive leisure', a term which appears to ignore the real but personal benefits to be gained from involvement in study.²⁴

Houle's typology of learners, the basis for much of the research on individual motivation, would appear to offer the most useful categorisation. Houle suggests the three categories of *goal-orientated learners* who use education as a means of achieving some other goal; *activity-oriented learners* who participate in education for the sake of the activity itself and the social interaction; and *learning-oriented learners* who seek knowledge for its own sake (Houle, 1961).

The findings of this section of the survey suggest the respondents are primarily Houle's goal-orientated learners, no doubt reflecting the vocational nature and aims of the programmes the Polytechnic offers and the students have undertaken. The next question therefore was whether they were seeking education for occupational change.

Finding a new direction

A key concern of the study was whether the students were aiming to change direction, i.e. reskill or to improve their skills, i.e. upskill. The majority of the full-time students wanted to gain skills in a new area. Thus 43 respondents (57.3 percent) declared they were reskilling in order to change career. The rest were divided between those who wanted more skills for an area they were already working in (N= 13: 17.3 percent) or had worked in previously (N= 10: 18.3 percent). A few (N= 4: 5.3 percent), like the nurse retraining as a midwife, found it difficult to decide whether or not this was a change of direction. One of the few full-time students who did not plan a change of career direction was the managing director of his own company. He continued to run this at the same time as studying jazz.

The new directions envisaged by the students covered a considerable range. Both a cleaner and a former electronics technician planned careers in medical diagnostic imaging; a flax weaver was studying organic gardening; a former soldier wanted to work as a viticulturist and a fitter/welder in the wine industry. A printer was studying horticulture and a carpenter wanted to work with people with disabilities. Less surprisingly, both a general nurse and a psychiatric nurse were training as mid-wives. A real estate agent sought a career as a teacher of the Maori language, a clothing machinist was changing direction to work as an administrative assistant and an accounts clerk wanted to find a position in the tourist industry.

Computing attracted a library assistant, a factory worker and a commercial technical writer while a nurse and a retail worker wanted to switch to technical work in science laboratories. A farmer planned to find employment as a civil engineer, an English teacher planned to switch to teaching Japanese and a machinist aspired to a career in fashion design. Interior design attracted a former nurse, an air hostess, a gardener and a sales representative while an army officer was switching to working in the ski industry, a chef to computer aided architectural design and an investment clerk and enrolled nurse were seeking to work in computing. A secretary was attracted to music teaching and performance and a postal service employee planned to capitalise on studying the Chinese language in some, as yet unspecified, way. A florist was furthering her interest in art and design, while a bookkeeper envisaged a new career as a photographer, and a nurse and a caterer were both pursuing plans to become social workers.

Seeking a change

The part-time respondents, in line with the pattern that is emerging, were more likely to be interested in updating their qualifications in an area they knew. But even in this group more than half as many (N= 33: 23.7%) were interested in changing direction as were in staying in the same career (N= 62: 44.6%), suggesting a strong interest in and commitment to career change among these adult students.²⁵

Among those involved in education for occupational change was an automotive engineer retraining after an injury. He was one of several, both full-timers and part-timers, who had help from ACC (the Accident Compensation Commission) to retrain. Those upskilling to expand their range of competencies and employment opportunities included a theatre wardrobe mistress who was studying clothing and textiles, a television projects manager enrolled in the Bachelor of Broadcasting degree, and a teacher on paid leave upskilling in business computing. A design draftsman was retraining after a six year absence “because everything has gone computerised” and, in response to pressures to modernise working practices, a builder was adding computer aided design to his previous qualifications. A senior quality controller with a background as a recording engineer was being sponsored by his employer: “specifically to provide expertise for my employers in computer networking”. Several enrolled nurses were upskilling by undertaking degree study or switching to midwifery.

Some answers indicated that respondents had already worked in several fields and were familiar with occupational change. One who had trained for secretarial work, had been employed primarily in bar work; at the time of responding to the questionnaire she was studying business computing and employed as gymnastics instructor.

Another pattern, that of the worker who first made a career change and then retrained post-hoc, was exemplified by the student who was studying building contracts and law as part of the Certificate in Architectural Drafting. After cooking for ten years, he had begun architectural drafting and then commenced studying when employed in this area. He therefore answered that he wished to gain skills in the area in which he was already working, having already made the change of direction.

Further anecdotal evidence of adults trying out new directions comes from a part-time evening class in landscape design for beginners. At the first session more than half of the 15 students present explained they were using it as a pathway to career change, adding to their vocational skills. One intended to apply for a full-time degree course, another wanted to supplement a masters degree in another area in order to change direction, a third had accepted a position as a site manager for a plant nursery and a fourth intended to work as a consultant. For a fifth this was the latest in a series of courses she had enrolled in; she was 'tasting' in order to check out possible career directions.

The question of what has motivated these students to return to study is very clearly answered by the overwhelming response that they are doing so in order to acquire skills and qualifications. Dissatisfaction with previous employment and the importance of career change as a major motivation is suggested by the high proportion of Polytechnic students seeking work in a new field, particularly among those studying full-time.

'Lifestyle learning'

It is likely that, in contrast to polytechnic study, university study will attract more activity-oriented and learning-oriented individuals, those whom Houle described seeking knowledge for its own sake (Houle, 1961). Two statements by British educationalist Peter Scott represent the differing attractions of 'learning to earn' and learning for leisure. On one hand some of the choices adults make in taking up further education options are prompted by vocational considerations.

As agents of social mobility universities are distributors of life chances as well as, in partnership with the rest of the education system, enhancing the life-chances of everyone. (Scott, 1998b, p. 111)

Others are motivated by 'lifestyle' or 'personal development', perhaps a sense of wanting to do something which involves the person, socially and intellectually.

"Universities also offer lifestyles which appeal to a growing proportion of the population" (Scott, 1998b, p. 111).

The new category of opsimath,²⁶ literally 'a late learner', applies to many degree students as well as those pursuing further non-credentialled education such as that offered by the WEA and U3A. In the case of the many mature students pursuing graduate study without any certainty that this will have career benefits, the motivations may be not unlike those suggested by Houle of the academic doing research as part of his/her job and motivated by 'the life of the mind'.

No other subject is more widely pondered and discussed by people interested in the education of adults than the motives which lead men and women to introduce systematic learning into the patterns of their lives. Legal requirements reinforced by social expectations no longer apply to them. Yet in the years beyond and amidst all the pleasures and duties of responsible maturity, many people are moved to devote part of their time to the development of their potentialities. They either go seeking for an activity or somehow become aware that one exists and are led by impulse, often obscure to themselves, to take part in it. (Houle, 1961, p. 7)

In the Scottish study which surveyed Open University, university and college students, the more personal or intrinsic benefits of study attracted the highest responses from the Open University students and the lowest from college students. These findings also suggested that the majority were seeking a qualification but

the perceived vocational returns ... were often generalised, long-term and uncertain. Most students hoped for some occupational advantage from their studies, either with their current employer or through a change of job, but they rarely knew precisely how, or when, this would occur. (Schuller *et al.*, 1999, p. 139)

Many students, bored in their jobs, found part-time study could provide a challenge and stimulation. There was also evidence that motivations can change over time with some students reporting that they had increasingly appreciated the more intrinsic or personal benefits of study.

And, as Brennan points out, the value as well as the motivations of a student engaging in further study are not always able to be appropriately assessed by assigning a monetary amount or a vocational destination.

Finally, it must always be remembered that higher education is not directly relevant to employment through the kind of education and training it provides, but through the ways students make use of these educational provisions. (Brennan *et al.*, 1996a, p. 2)

Thus whether or not the student had such benefits in mind when they began, study undertaken initially for vocational reasons may still prove to be emancipatory. The converse is also true.

Costs and opportunity costs

Estimates of costs, in terms of financial, time and opportunity costs, and benefits are closely linked for students. Schuller *et al.* comment on the relationship between motivation and anticipated financial and career benefits, suggesting that 40 per cent of those whose motives were purely personal nevertheless anticipated some financial benefit.

Rightly or wrongly, many people anticipated some career benefit, even though that had not been the purpose of their decision to study. This illuminates the complexity of the relationship and the difficulty in sorting out the world of work from the personal world. (Schuller *et al.*, 1999, p. 171)

The Christchurch Polytechnic study questioned the students about the costs of their study in terms of time and fees. For the full-time students there was fairly even spread among those enrolled in a one, two or three year programme. Several of those who took the opportunity to comment linked the duration of the course and its cost saying that they had started when fees were lower and would have made that same decision now fees are higher.

In answer to the question of who was paying the course fees, two thirds of both full-time (N= 50: 66.7 percent) and part-time (N= 90: 64.7 percent) respondents replied that they were paying themselves. Conversely this would suggest that one third of the subgroup and of the total group had their fees paid for them by the state, in the form of a benefit-related allowance, or by employers. Information which would enable these groups to be distinguished was not gathered but it is likely that more of those in the full-time sample were funded from government sources because they were beneficiaries, while part-timers were more likely to be assisted by an employer.

Responses to the follow-up open-ended question on the effect of fees revealed that some of the full-time students were confused as to whether taking out a student loan constituted

paying your fees yourself. As the students did not have to pay the money directly, they presumably felt that it had been paid for them, although they would ultimately have to repay the loan. Further information from the full-time students²⁷ revealed that only the two in this group whose fees were paid by ACC, eleven whose fees were paid by Income Support²⁸ and one who was supported by Work-bridge, did not have to take direct personal responsibility for the payment of fees. The existence of the Training Incentive Allowance made it possible for some beneficiaries, usually women, to study while they had dependent children in anticipation of returning to the paid workforce in the future. Among the part-timers were several who commented that while they initially paid the fees themselves their employers would refund these on the successful completion of the course.

In response to the invitation to comment, many respondents offered strongly worded critiques, some of them writing more than a page of opinion and personal experiences. While some responses mentioned the courses as representing value for money, others questioned this. The majority were concerned about the level of fees. In line with the findings that the pay gap means that women find it harder to repay loans (Ministry of Womens' Affairs, 1999), many of these were women. For one it was hard and "I had to budget." Another found it "very stressful as I had to borrow. I was afraid of failing." A third was concerned about amassing a loan when she had three children to educate. A fourth student, who was training to be a science technician, had a husband who was unemployable for health reasons. She was conscious of needing to support them both and their 16, 14 and 11 year old children. Another student commented, "I am currently on a fiscal tightrope and I could fall off any time." A business auditor, whose fees would be reimbursed by her employer if she passed the course, noted that for this reason, fees were not a problem but added an unprompted commentary on the perceived pressure to upskill.

However money is tied up for six months so it is more attractive for me if fees are lower. Higher fees may mean cutting back to one course per year. I also feel for students in lower paid jobs who do not get reimbursed by the employer. This places them in a very difficult position. They may wish to improve their employment skills and therefore get a better paid job but can't do so if the fees are too high. I consider this to be a very unfair catch 22, especially when 'upskilling' is regarded as a major requirement for the adult workforce.

This response is in line with responses from students in the Scottish survey, 56 per cent of whom said that the financial costs were 'very significant' although, not surprisingly whether or not the employer contributes to the fees made a difference (Schuller *et al.*, 1999, p. 167).²⁹

The finding that few of the part-timers' fees were paid is in line with the survey of wage and salary earners carried out by Statistics New Zealand in 1996³⁰ which found that the most common form of employer support was for the provision of in-house training and that "[w]age and salary earners were more likely to receive employer support for external training than for study towards a qualification" (Gobbi, 1998, p. 119). Twenty-six percent of the employer support was for study towards qualifications and

[e]mployer support was most commonly provided for study towards skilled and advanced vocational qualifications and bachelor degrees. ... Full-time employees, older workers, workers with relatively high qualifications, those in relatively high skilled occupations and those who had worked for their current employer for relatively long periods of time were more likely to participate in in-house training and to receive employer support for their external training or study towards a qualification. Males were also more likely than females to receive employer support for their training and study towards a qualification. (Gobbi, 1998, p. 120)

No question was asked of the Polytechnic students about living allowances as these are less accessible for older students but the opportunity costs were clearly in the minds of the respondents and many mentioned concerns about getting into debt by taking out a student loan at an older age. Several commented on their anxiety about spending money on their own education when they were aware of upcoming costs in supporting their children through tertiary education. There is clearly a reflection here of concern at the personal implications of Government policy.

Costs and opportunity costs impact even more severely on couples and families where more than one member is studying. Patrick and Marion³¹ are a married couple, living in Christchurch, who are unusual in that they have both been studying as mature students. During this period their children have moved from school to university study. Patrick, a manual worker with no qualifications, enrolled first as an adult student at high school and then in a university degree, combining study with shift work at night. Marion, who had left school after the sixth form had a responsible job in a government department which she returned to after a period caring full-time for their children. She studied part-time at a polytechnic until her husband, sensing she wanted something more and enjoying his own studies, suggested she begin university study. She has been completing two courses a semester towards a bachelor's degree and has been promoted at work while Patrick has graduated with a masters degree and is employed in a professional position. Clearly exceptional in their commitment, this couple have coped by both mixing study and work.

Their commitment to, and valuing of, education has been a bond for them as a couple and with their children, at the same time that it has meant financial stringency.

The effect on adults returning to study having to pay increased fees for both their children and themselves does not appear to have been raised in public discussion.

The value of 'adding value'

Much of the discussion about the fact that, worldwide, those who are already educated are those most likely to return for further education is quite properly concerned with the inequality this reveals (OECD, 1996; Gobbi, 1998). Those who have already benefited from state-funded education are those who are thus further seen to be advantaged. Without denying the justice of this stance, it is important to note the higher social, not just individual, returns that eventuate as a result of little additional investment when a mature student adds to their existing skills, knowledge or abilities.

Given that Schuller *et al.* suggest that part-time and mature students share many similarities, it is note-worthy that they add:

it is possible to make the point that the value added is likely to be higher for part-time students, even when their attention is divided between the various parts of their lives. In other words, a relatively small amount of teaching can have a very substantial effect. Enrolment at an institution changes a person's attitude, converts external experiences into potential sources of learning and converts that person also into a source of learning for others. (Schuller *et al.*, 1999, p. 196)

According to Shona Butterfield of the Open Polytechnic (personal communication, 20 October, 2000), older students whether, for example, entering nursing or retraining to becoming a manager, are reskillers who "break down barriers, as they bring in other experiences and open up cross-disciplinary communication channels" both during the educational process and also in employment. In this way they contribute more than 'single career' employees can.³²

The concept of transferable skills is frequently used to encourage those re-entering the labour market to recognise the skills they bring from non-paid work. This concept also applies to those moving across discipline areas.

There is a widespread conviction that a growing number of jobs require knowledge from several disciplines, thus calling for new mixes of fields of study, for interdisciplinary learning, or the ability to cooperate with experts from other disciplines. (Brennan *et al.*, 1996a, p. 8)

Conclusion

Chapter 1 suggested that in New Zealand, retraining would be undertaken by individuals on their own initiative to an extent unknown in the countries chosen for comparison, namely the United Kingdom and the Netherlands. The study supports the statistical data which show New Zealanders returning to study, full-time and part-time, in considerable numbers. This is particularly true of women. Women are proportionately over-represented both in the numbers of students enrolled at the Polytechnic, and in the numbers of mature students (both full-time and part-time) in comparison with the numbers in the total population. Women continue studying to later ages and for women, the studying for occupational change is positively linked with having dependents, whereas there is an inverse relationship between dependents and commitment to study for males.

Investigating the patterns of activity of these students revealed the increasing incidence of portfolio lifestyles where people move into and out of study and employment and combine these with family life. These students gave the gaining of skills and qualifications as their major motivation for including study in this demanding mix, with the majority aiming to change career. A few had already made a change of career and were gaining the credentials post-hoc.

The costs incurred by a student include their expenditure in time and effort, actual financial costs in terms of fees, and opportunity costs. Some students received assistance from employers, or the state, to pay their fees but most funded their own training. In New Zealand there seems to be a sizeable demand for, and uptake of, reskilling by individuals, notwithstanding the fact that there is little state support for them to do so.

Concluding Section 3

Section 3 of the study has investigated more closely the individuals who are returning to education as mature students. Three types of mature students were identified: *second chance learners*, *upskillers* and *reskillers*. The case study of the women enrolled at the Next Step Center at Christchurch Polytechnic illustrated both the pioneering role of women in the area of retraining for the workforce and the changing nature of this activity. Access, participation and provision of tertiary education in New Zealand, the United Kingdom, and the Netherlands, were discussed with the differences and the significance of local factors being illustrated by with a study of provision in three cities. A study of students at

Christchurch Polytechnic confirmed statistical data in earlier chapters which suggested that significant numbers of New Zealanders are undertaking education for occupational change.

The final chapter provides an overview of the findings of the study. Then, on the basis of the findings I consider first, the implications of the changing patterns of life that they reveal and second, the implications for New Zealand educational policy. Finally I propose an explanation as to why education for occupational change has such a low visibility in the research literature and in the practical actions of state and educational providers.

Notes

¹ The Time Use Survey was conducted from July 1998 to June 1999. Among the major policy issues which the time use data were gathered to inform were, according to the Users Guide to the Survey, “education and training; how much is being undertaken and by whom” (Statistics New Zealand, 2000).

² This latter included part-time study at tertiary institutions. According to this survey conducted by Statistics New Zealand, just under half the wage and salary earners participated in education or training as so defined. Most commonly this was in-house training, with 16.9 percent studying towards qualifications.

³ The study by Schuller *et al.* provides information about part-time students in Scottish colleges and universities or studying through the Open University. The authors suggest their study “has confirmed a general difference between full-time and part-time students which is broadly equivalent to the distinction between young and mature. Whilst there are many mature full-timers, there are relatively few young part-timers. Part-timers therefore exhibit most of the advantages and disadvantages of maturity when it comes to study” (1999, p. 195). Note the equation between part-time and mature students which is less true in New Zealand.

⁴ The student records are computerised and based on information supplied by the student at enrolment. With the permission and assistance of the Christchurch Polytechnic Directorate, and the Student Records section, the student records were examined without, at this stage, students being identified by name.

⁵ The study by Schuller *et al.* defines mature student as for undergraduates those who are over 21, and for post-graduates, those over 25 (1999, p. 144).

⁶ Although such profile questions are normally more appropriate at the end of a questionnaire, asking them early caused no observable problems.

⁷ Those over thirty who enrol in a full-time course are making a considerable commitment and often financial and other sacrifices. Although there may be those in the part-time group who are working towards a change of career it is more likely that the full-timers are committed to retraining for a job or career than those who enrol in a course which takes place for an hour or two a week. In most such full-time courses screening at entry means that those intending to work in the industry are given preference but there are no guarantees that those selected have firm motivation to seek employment in the area. The situation with part-time courses is even less certain as in most cases there is no selection so that a course concerned with, say, food

preparation, may be undertaken by one student as part of a preparation for employment and by another out of a desire to learn about making sauces.

⁸ This is particularly noteworthy given the age (30 years) chosen and that, e.g. De Montfort University consider they have high numbers of adult students with 15% of their students over the age of 21.

⁹ Appendix B2 lists the relevant course occurrences with the number of students who could potentially be surveyed and the actual number chosen from each group. Where there were one, two or three students in a course all were chosen; over three and three were chosen. There were two exceptions to this attempt to ensure coverage of courses in this way. Only one student was selected from each of the Maori language course occurrences as the coding for these differed and the proportion of course occurrences to students was higher. Selecting three students from each of these courses would have been disproportionate.

¹⁰ There are many more part-time than full-time courses at the Polytechnic meaning that extra care had to be taken to ensure the representative nature of the full-time sample. While consideration of the number in each course was relevant for the full-time sample, this was not important for the part-time sample so Appendix B2 provides this information only for the former group.

¹¹ Selecting a maximum of three students from each course ensured a reasonable possibility of a response from each class but at the expense of under-representing those in the larger courses. Nursing is the most significant of these traditionally female courses. Twelve students were selected out of a total of 66 nursing students, whereas in general students had at 104 / 225, almost two-and-a-half times as great a chance of being selected.

¹² The questionnaires were posted to the 105 full-time and 195 part-time students selected with a covering letter together with a franked return envelope, explaining the purpose of the questionnaire and guaranteeing confidentiality. A reminder letter was sent after a period of 2 weeks had elapsed without a reply being received.

¹³ Among the problems associated with administering a questionnaire in a form where it is not possible to prompt is that of missing replies. While not numerous, these did occur with some questions which required more than factual answers. The questions that appeared to cause some respondents most difficulty were those that were open-ended and some of the last questionnaires to be returned had more non-responses to questions than did the earlier replies, raising the possibility that levels of literacy affect the response rates both to an entire questionnaire and to particular questions. The results for all questions, therefore, do not always add up to 214. Those questionnaires in which answers to some items were missing were included as although they were not complete the gaps were not significant overall.

¹⁴ Frequencies and cross-tabulations by full-time and part-time status for answers to all questions are given in Appendix B3, as are cross-tabulations by gender for those questions for which gender might be a significant variable.

¹⁵ This statistic is calculated from Lincoln University information (personal communication: Roger Smyth, Assistant Vice Chancellor, 23 November, 2001) on the basis of age participation figures for Semester 1 and full year enrolments.

¹⁶ Business and Professional Communication, 1999.

¹⁷ Of the total who responded 42 (56 percent) were of the full-timers were women, with 33 (44 percent) men. Of the total sample 142 were women (66.4 percent) and 72 (33.6 percent) were men.

¹⁸ Interestingly the higher participation level for men under 35 in New Zealand is also noted in OECD statistics. "Participation rates in continuing education and training are generally similar for men and women in the ten countries for which data are available. None of the gender gaps that can be observed are statistically significant, with one exception: men are more likely than women to participate among 25 to 34-year olds in New Zealand (the gap being 13 per cent) (Table C1.4)." OECD, 2000, p. 132.

¹⁹ WINZ (See Chapter 8, footnote 24) was succeeded by the Department of Work and Income, and then incorporated into the Ministry of Social Development. The TIA is now available at the discretion of the beneficiary's case worker.

²⁰ However both the request to name the qualification and/or the first question about the name of the course they were enrolled in failed to get a response in five cases.

²¹ The Time Use study revealed that the commitment women make to unpaid work begins early. "In the 18-24 year old age group men and women combine part-time paid work, unpaid work and education differently. Whereas men spend more time on education, women spend more time on unpaid work responsibilities." (Statistics New Zealand, 2000).

²² I can endorse this on the basis of personal experience. Having started this Ph.D. project out of interest and a desire to research the topic for my own satisfaction I now find, as a University faculty member, that the qualification is a relevant one for professional reasons. Through interviews Schuller *et al.* (1999, p. 178) found that older students were more likely to be studying for personal rather than for vocational purposes. Given that as people age it is more difficult to re-enter the workforce or change jobs this appears a plausible hypothesis, but there is room for further research in this area.

²³ The full-timers studying mainly for interest were the jazz aficionado mentioned elsewhere, a woman motivated to learn about growing organic food for her family and a student of the Chinese language who had embarked on the degree out of interest but hoped to be able to use her learning vocationally. Checking whether educational qualification affected the desire to change career revealed little difference, with similar numbers in each of the educational categories.

²⁴ The Time Use Survey classifies time as necessary time, that required for personal care; contracted time, that used for labour force activity, education and training; committed time, that spent in household work, care-giving for household members, and unpaid work outside the home; and free time in which sports, hobbies, mass media and free time activities are pursued. These categories would be useful in discussing the pursuit of education where those involved were clear about their motivations, i.e. whether they were studying for vocational or leisure purposes. (Statistics New Zealand, 2000)

²⁵ Thirty one of the part-time students gave answers which could not be clearly categorised, usually because they ticked more than one box, thus indicating that they were not yet clear about their future direction. This is unsurprising as many students 'put a toe in the water' by enrolling in a part-time course before making a firmer decision about whether or not to change career.

²⁶ The word *opsimath* derived from the Greek word 'opsimathes' to learn late, entered the English language in the seventeenth century as a term of derision. Recently it has been rehabilitated to refer to people who continue learning through their senior years. One of the most striking examples I have come across is that of Elva Betts who took up university study in 1991, when her husband died. In 2001, at the age of 82 she was working on a Ph.D. on the bared female breast and how it has been represented in mythology, religion and art from the stone ages to the present time (Waller, 2001, p. 22).

²⁷ Five students answered that they were paying fees themselves, using a student loan; eleven said they were not paying themselves as the fees were paid with a student loan.

²⁸ Now the Ministry of Social Development.

²⁹ Employer support was reported in this study as being given to enhance the skills and effectiveness of their workforce and to encourage and reward loyalty. Some large employers had an explicit human resources policy but most support was allocated in an *ad hoc* manner (Schuller *et al.*, 1999).

³⁰Source: Education and Training Survey, September 1996, Statistics New Zealand.

³¹ Personal communication but their names have been changed.

³² Shona Butterfield (personal communication, 20 October, 2000) provided the striking example of a doctor whose career was affected by the demands of reconciling it with that of her husband. She added qualifications in a specialist area to her original medical training, becoming a medical specialist in a hospital. The threat of redundancy led to her gaining management qualifications that she used in working for a United Kingdom ministry. She then capitalised on her previous career experiences and on both lots of training, by becoming a medical researcher with an international aid agency. In this role she was able to make a humanitarian contribution which would not have come about had she not been forced to retrain because of being made redundant from the hospital position. Her willingness and ability to add to her skills and experience meant that these were not lost, as they would have been if the opportunity to retrain had not been available. Because she had been continually learning, both formally and informally, a small amount of retraining resulted in great benefits for her personally and for society.

Chapter Twelve

The knowledge society

There were, in every generation, scholars who attempted to endow education with a higher purpose and who laboured to provide a theoretical corrective to the specialized competitive forces which pervaded society around them. By their writings, they sought to keep alive educational breadth, *to promote the idea that education was a life-long process* and a means of perfecting human qualities.

A. B. Cobban (1975, p. 225; italics added)

Institutions, books, education, society, all go on training human beings for the old, long after the new has come; much more so when it is only coming. But the true virtue of human beings is fitness to live together as equals, claiming for themselves nothing but what they as freely concede to anyone else.

John Stuart Mill¹ ([1869] 1989, p. 160)

Tertiary education in some form or another for the large majority if not all people is an appropriate policy target; it should be inclusive not, as in the past, exclusive; and it should form an integral part of lifelong learning with close links to secondary schooling for younger students and to the community for all students.

Only through a great variety of inter-related, well-recognised and attested study opportunities and settings, programmes and institutions, and methods of teaching and learning can the goals of high quality and relevance be achieved ...

The greatest challenge presented by the emergence of high-volume tertiary education is to provide a high quality of education for all at an affordable cost. As countries explore ways of achieving this, they will benefit from a continuing exchange of experience and the systematic, comparative evaluation of results.

OECD (1998, p. 107)

The research up to this point has established that the rhetoric of lifelong learning is paralleled by reality, in that continuing formal education has become an integral part of many people's lives. It has also, however, revealed a significant property of this education and retraining not noted in the rhetorical discourse: the emergence of mature students

undertaking full-time education for the purpose of occupational change. This has been found to be significant in New Zealand.

The first task of this final chapter is to recapitulate the major characteristics of education for occupational change as it manifests itself in New Zealand institutions. It then reviews the global and the local factors which have led to retraining, education for occupational change, becoming a feature of New Zealand society at the beginning of the twenty-first century. Significant implications for educational policy, both in terms of social benefits and the desire for a 'knowledge economy', follow from this discussion. The interrelationships between changing life patterns and education for occupational change are also discussed. In addition to summarising the other findings of the study, Chapter 12 shows that the portfolio lifestyles of those seeking education for occupational change are those of a pioneering group. The changing patterns of work, education and leisure which are already evident are likely to become more common. Finally the study considers why education for occupational change has been largely overlooked and not previously researched.

Features of the new phenomenon

Education for occupational change, the new form of retraining by adults, is emerging alongside the traditional forms of learning by mature students summarised at the beginning of Chapter 10: that known as adult or continuing education;² the education sought by second chance learners; and upskilling of those employed. A number of discernible features mark the emergence of education for occupational change in New Zealand.

Education for occupational change in New Zealand

Statistical information about full-time students reveals a high incidence of adult participation in New Zealand, much more so than in the countries chosen for comparison. The rapid rise in this participation has been marked, indicating both the low base level of previous educational participation and the emergence of significant levels of education for occupational change in New Zealand. New Zealand may be a leader in this field because of historical and geographical accidents that enable it to be more open to social change. As a society which is still close to its pioneer past, New Zealand is less constrained by the tradition and the power of established groups which inhibit change than are long-established societies. On acquiring the relevant training it is possible for someone to move from one career to another, from one profession to another and to be accepted in that new position.

Despite increasing credentialism, opportunities to change career are still available because of the mobility and flexibility of New Zealand's labour market. New Zealanders anticipate opportunities will be available a result of retraining, opportunities which are not obvious, or not available, to comparable adults in the other countries studied.

Individual initiative

While those who have become unemployed may seek further credentials to re-enter the paid workforce, the emergence of education for occupational change in New Zealand is not confined to those who are forced to make a career change because of unemployment. Retraining appears to be undertaken more and more by adults on their personal initiative. Of their own volition, these reskillers enrol at tertiary institutions, pay their own fees and cope with the opportunity costs as they study for qualifications which will enable them to work in a new area.

Institutional location

That this retraining is taking place in tertiary institutions relates to the size and nature of New Zealand. With its small proportion of large firms and history of state provision, vocational education and upskilling in New Zealand has been traditionally undertaken in state institutions. The pattern continues with education for occupational change. The tendency is enhanced by credentialism which means that qualifications may be required to gain a position, whether or not they are required for the job.

Lack of state and institutional recognition

Retraining, in the form of upskilling and reskilling, does indeed exist as the politicians have announced. Education for occupational change is, however, still largely ignored, rather than being assisted, by state policy and institutional provision. There is no evidence of acknowledgment by government or institutions of the existence of, or provision for, this group of students. Two reasons for this neglect seem plausible. One is the failure to recognise the existence of this emergent pattern because of the absence of focused research and monitoring which would have uncovered it.³ The other is the continuation of the ideology that deems the benefits of educating an individual to be a private matter, rather than a public good to be encouraged and supported. This view persists despite calls for a more skilled nation and a better-educated society.

Global background

The early chapters showed that global influences have affected the nature of both work and education. National economies have increasingly been subject to international pressures, workforces have expanded, employment has been casualised and workers have been forced to be 'flexible'. As more and more people, women as well as men, young and old, compete for jobs, workers have found that credentials, not skills alone, are required in order to gain employment. Skills have been socially reconstructed so that they are not recognised unless accompanied by qualifications. As a consequence, education has become a positional good, desirable because possessing credentials associated is an advantage when seeking employment.

The 'massification' of tertiary education signals an increase, not just in school-leavers entering tertiary education, but also in adults returning to study. Second chance learners have been recognised in New Zealand, and internationally, as a discreet group of adult learners. Upskillers who learn on the job, or off the job but for employment-related purposes, are also recognised in research and national and international statistics. Those undertaking education for occupational change are the group of adult students who have been little recognised and seldom studied. Uncovering their existence in New Zealand has allowed for the further discovery of a number of consequential findings.

Findings

The first major finding is that, while global influences affect work and education as they exist at a particular time, socio-political location is critical in determining the forms that both work and education assume. Local culture and influences, policy and priorities, mean that assumptions about tertiary education cannot be transferred from one locale to another.

Schuller *et al.*, in their study of Scottish adult students, for example concluded that the equation between part-time and adult students was so close that they could be considered to share the same characteristics (Schuller *et al.*, 1999, p. 195). Such an identification between part-time and adult students cannot be drawn in New Zealand where there are now significant numbers of full-time, adult students. Thus the correlation between part-time and adult, full-time and young students is not a universal.

Some societies are more open to change than others. Gooderham and Dale studied the fate of mature graduates in the labour market in Britain and in Norway. They concluded that

a policy of redressing skill shortages by increasing mature graduate output is more likely to work in Norway, with a weaker dominant class, than in Britain where labour market entry is more readily controlled by a dominant class. (Gooderham and Dale, 1995, p. 3)

The history of New Zealand tertiary education with its features of, for example, open entry and high levels of part-time participation, mean tertiary education in New Zealand is distinct from that elsewhere. The pioneering character of New Zealand society appears still to manifest itself in New Zealand.

New Zealand already has a much more diverse system and less rigid boundaries than many other OECD countries. Change is relatively slow in more traditional countries with more rigid boundaries between parts of the sector. (von Dadelszen, 1999, p. [1])

There appears to be greater flexibility in New Zealand society and institutions than in those countries chosen for comparison, as evidenced by the open nature of tertiary education,⁴ the ability of adults to change career and the uptake of education for occupational change.

Pioneering, then main-streaming

The case study of the *Next Step Centre* illustrated the pioneering role women have played in education for occupational change in New Zealand. When in the 1960s and 1970s women in New Zealand began to return to employment, many sought first to regain their confidence and update their skills by enrolling in retraining courses. Initially this type of education was sufficient for them to be able to find paid work but, as unemployment rose, increased competition for jobs resulted in greater demands for qualifications. Further courses and credentials were required. Women moved to attending mainstream courses in order to be able to compete for positions against those with mainstream qualifications. This process appears to have taken place more rapidly in New Zealand than in the countries chosen for comparison. While *New Outlook* courses still exist, most women re-entering the workforce now by-pass them in favour of mainstream qualifications or direct entry into employment.⁵

‘Mainstreaming’ also affected the *Liberal Studies Certificate*; numbers dropped as students increasingly enrolled directly in degree courses when entry was opened up in 1990.⁶ Market forces and credentialism may also be causal in this change because fees increased and students realised they could earn more points towards a degree for the same money by enrolling directly in the degree itself. *New Start* courses have declined in popularity with students switching to the study skills courses supplied by the universities for all students,

another example of mainstream provision.⁷ Again cost is a factor as universities have ceased to provide *New Start* programmes or done so on a cost-recovery basis.

It can be concluded that mature students are increasingly choosing to enter regular courses, at universities at least, rather than seek special provision. It is difficult to know whether increasing costs in the form of fees and opportunity costs in terms of time are driving this choice or whether students prefer to enter directly into mainstream courses. Such special provision for second chance learners appears to be declining in New Zealand at a time when it still flourishes in other countries.⁸ It may be that again New Zealand is pioneering a change in direction in the provision of education for adults. (The potential merits or otherwise of such a change will be considered in the next section on policy.)⁹

Alternatively the switch to direct entry may be a result of the change in the composition of mature students. Mature students are no longer predominantly second chance learners; adult students are as likely be upskillers, or reskillers, or recreational learners. The appropriate provision for these groups will differ from that for second chance learners. Policy-making about this provision needs to be based on awareness of the needs of the particular student groups if optimal results for the investment in education are to be realised for the learners and for New Zealand society.

Policy implications

In the light of the foregoing research findings, it would be irresponsible not to make explicit what I believe would be useful policy directions for New Zealand to pursue in fostering a genuine lifelong learning environment. Many of these directions are already implicit in much of what has been said earlier.

Two of the most discussed goals of recent New Zealand tertiary education have been 'seamless education' and 'a knowledge society'. Reconciling these goals means providing education which is open to all and also providing education which is clearly focused. The system needs to be 'seamless' in the sense of enabling people to move easily in and out of education, but not in the sense of being undifferentiated. A seamless education system which will provide appropriate lifelong learning for the knowledge society will be open to all but it will differentiate in provision, providing that which is appropriate for each learner. Students will be able to move easily within the system, according to their needs. A 'seamless but differentiated' tertiary education system recognises the different needs of each learner and the different expectations and demands that society can have of each.¹⁰

Research which focuses on students is thus of primary importance as a prerequisite to policy formation. The existence of particular groups of students must be identified and their characteristics recognised before they can be appropriately catered for. I would argue that failing to distinguish and separate the needs of different groups of students runs the risk of confusing access and provision, two different aspects of 'seamless education'.

There are implications for funding in this approach, based on the need to ensure the best outcome for each learner and the best use of funding. These needs vary with each type of learner. Only if funding takes account of the learner, as well as of the type of course, will it be effective.

To exemplify, it is already recognised that second chance learners need particular kinds of support to succeed. Tuition in small groups and individual encouragement are necessary and bridging courses provide the preparation for higher level courses. Second chance learners are not likely to succeed where distance education is the delivery mode. Distance education, by definition, lacks the face-to-face support necessary for the educationally disadvantaged.

On the other hand upskillers who are already employed and educated, and motivated to upskill may find that studying through distance education fits their requirements. The special provision for upskilling might include tax incentives for employers who provide time and pay fees for their employees.

In the case of those seeking education for occupational change the necessary provisions are not the same as those of second chance learners. Although reskillers are mature students, they do not require the traditional support required by re-entry adults. Whether or not their previous experience is recognised through RPL, they will transfer skills and learning from previous employment and education to the new challenges they take on. Those who are already educationally experienced can learn quickly and, as those who have taught them know, they demand quality and are impatient of under-resourced education. A high 'added value' approach and expectation is appropriate, including teaching enhanced by current research. In return they will repay the society in which they learn and work.

There are funding implications for the institutions in which this group studies. The courses they take must be informed by current knowledge. It is also important that the financial disincentives they face are not overwhelming, given the extent of the opportunity costs for individuals who may have to support a family while they change career.

Again research is crucially important. The evidence of the student loan scheme is clear; while warnings were sounded about the potential effects on individuals' lives there was little attention paid to these warnings. Experts predicted problems but their voices were drowned out by ideological discourse. The wide-ranging research which should have alerted New Zealand society to the consequences now affecting individuals and the country was not undertaken. Ideological capture similarly affected the introduction of the NZQA Framework which was adopted from overseas and applied to the New Zealand system. Global influences tend to be given much credence but the uniqueness of local conditions is one of the findings of this research.

Those New Zealanders who are studying in order to gain new qualifications and add to their skills could make a considerable contribution to the economy and society. They have demonstrated their willingness to learn. They combine knowledge and experience from more than one area. Many have embarked on education for occupational change despite the absence of incentives or encouragement from government and providers. Student fees and inadequate provision of quality education are the largest potential disincentives. Chapter 8 showed that while there were initially social barriers to women's participation in tertiary education, as these were removed fees became the biggest barrier. The same process appears to be occurring for those seeking to add to their qualifications. Social conditions and state rhetoric now encourage lifelong learning but cost and opportunity costs work against adults enhancing their ability to contribute to society in this way.

Achieving the 'Knowledge Society' depends on providing appropriate provision for the different groups of learners, without inappropriate barriers. Further research is required to ensure that education policy will succeed. State policy will be effective only if it addresses the needs of learners. The consequences of policy changes for learners must be anticipated and based on research.

The Changing Patterns of Life: Work, Education and Leisure

Findings of the research as to the incidence of education for occupational change, and the students undertaking this form of study have been outlined. There remain other findings which are also significant in their potential.

It has been shown that over the post World War II period there have been significant changes in life patterns, in the ways in which people mix work, education and leisure in their adult lives. Whereas once the stages were relatively fixed, with formal study and

employment as distinct phases, now the boundaries between life stages are permeable as is shown by the statistical information, the Time Use Survey, the Polytechnic student survey and personal evidence from the lives of individuals. New Zealanders may not only have several careers sequentially in their working lives, they may at one time hold several jobs and also engage in study concurrently with employment.

Portfolio lifestyles are now increasingly accepted so that being a student is no longer a transitional phase between school and work. Most students are now also employees, and employers may be students contemporaneously with their other roles. The components of a portfolio lifestyle may be combined sequentially or concurrently. That the learning they undertake is likely to be formalised and credentialled is another feature of the new pattern. The pattern of portfolio lifestyles appears to be emerging as a distinct feature of life in New Zealand.

Combining study and part-time work has been observable in the United States since the 1980s (Rikowski, 1992) and is on the rise internationally (Dex & McCulloch, 1995; Ford, Bosworth & Wilson, 1995). Evidence from three recent studies in United Kingdom records the scale and intensity of participation in part-time work by 16-19 year olds in full-time education. Hodgson and Spours note that the combination of full-time study and part-time work increased noticeably towards the end of the 1990s and that “a growing commitment to part-time work has become the norm for learners in full-time 16-19 courses” (Hodgson & Spours, 2001, p. 373). Among the factors which they cite as contributing to the increasing co-occurrence of earning and learning are continued economic growth, youth consumption and “the spectre of increased higher education debt” (Hodgson & Spours, 2001, p. 375). Even more important are their findings about the development of peer expectations and “the powerful pressures to work” which result in this new cultural norm. Students become dependent on the expected income but are also strongly motivated by non-financial reasons such as gaining independence, building self-confidence and social contact and identity so that:

It is patently obvious that part-time employment is now the absolute norm for sixth-form students in this school. It is as much an ingrained part of their lives as their academic work or their social activities. Those who do not work see themselves as deviating from this norm and are frequently embarrassed by the fact. (Essex teacher) (Hodgson & Spours, 2001, p. 380)

Teenagers and young adults are only some of those for whom the barriers between previously separate parts of life are breaking down. As this research has shown, in parallel

adults are adding study to the mix of their lives that may already include one or two jobs, family responsibilities, social activities and community involvement. Adults seeking education for occupational change are those of a pioneering group but their portfolio lifestyles are likely to be shared by more and more people in the future. This is a particular manifestation of the more general post-modern phenomenon of the breaking down of distinctions and barriers which typify the current socio-cultural world, particularly in the 'Western' democracies.

I have suggested that institutions and policy makers have not yet fully recognised the existence and significance of those seeking education for occupational change. Now I want to make a further claim: this pioneering group of adult students may be only part of a much more significant change. The consequences of lifelong learning becoming, as the cliché suggests, part of all our lives may be greater than most people have yet envisaged. Among the certainties that are disappearing are the expectations of distinct phases of life: education and student life, succeeded by graduation as a rite of passage and entry into adult life and employment.¹¹

As the barriers between lifestages collapse and the mix of work and education changes for everyone there are serious implications for employers and workers, for policy makers and education providers. Much research is required into the future of work, its relationship to study, the consequences for demographic change and the economic consequences for all of society.¹²

Women's work: An outstanding question

I have noted at various points that there is an invisibility about education for occupational change. I have not, however, provided any satisfactory explanation for this. At times I have placed the invisibility of educational for occupational change alongside the traditional invisibility of women's unpaid work. I will now speculate on the relationship between the two since they are plausibly related.

Women's work has a number of interesting properties in common with education for occupational change. In most Western ideologies, women's unpaid work receives rhetorical endorsement in the ideology of the family. Child rearing, while invisible as work, is held up as a central and crucial duty. The image of the caring, nurturing mother is a long-standing Western icon.¹³ The rhetoric surrounding retraining is similarly selective. It is held up a self-evident good both for those who do it and for the contribution it makes to the common

weal (Chapter 4). That it also has a down-side in terms of cost and effort is not acknowledged.

Women's unpaid work was, until about thirty years ago, subject to little or no attention. It was not until the second wave of the feminist movement determined that women's position was worthy of investigation, that the nature and scope of women's work was researched. Education for occupational change, which originated in the same movement, has been in existence for over twenty years. It is also under-researched.

Women's unpaid work is seen as being in a service capacity, in that one is serving others within the family, both nuclear and extended. The theory is that, on that account, the work is fulfilling, if unpaid. So too with education for occupational change. The education, while it appears to be primarily for the student in allowing her or him to change occupation, is championed rhetorically as being essential for maintaining one's place in the competitive labour market and thus enabling one to make a contribution to the household and the wider economy. Indeed the rhetoric is that one is morally obliged to undergo retraining for the common weal.

Traditionally women's unpaid work has involved large opportunity costs for women. They miss out on experience in the paid workplace, including upskilling when their former occupations, if they had them, are redesigned around new technologies. For example, women who trained as typists found when they return to paid work that typewriters had vanished. The costs have also included missing out on promotion and the widening responsibilities and learning that go with promotion. Education for occupational change shares the characteristic of opportunity costs. While one is reskilling, one is preparing for a new career path where one starts, if not at the bottom, in many cases not as far up the ladder as if one had been in the career all along.

Lost earnings are another notable similarity. Women who exit the paid workforce for unpaid work may lose many tens of thousands of dollars, or more, in the process. This is a financial loss which most women who suffer it never make up. So too with the retrainers. While they are retraining, they forego earnings and incur expenses such as tuition fees. The rhetoric is that this is made up for by increased earnings (Chapter 5). But this is not necessarily the case. People may retrain for a career which is not as remunerative as they one they left. They may find that the remuneration, after retraining, is lower than it was when they decided to retrain. They may retrain at an age when it is not possible to make up the losses incurred in foregone earnings and expenses of the retraining.

Chapter 8 has shown women were the pioneers in education for occupational change. They sought education and training in order to move from the position of doing invisible, unpaid work to doing more visible, paid work. However that work was, in many respects, still in the same areas as work in the home. It was largely in the service and caring professions with their low wage rates and low prestige. Women moved into the paid labour market at the time when the service sector began to expand and often worked in the lower regions of it. Getting women into traditionally male occupations proved much more difficult (Kuiper, 1986). To some extent this was the result of a clash of cultures and it also owed something to the fact that, in a number of these occupations, the labour force was shrinking. From the start, therefore, education for occupational change was women's work: unpaid, difficult in that it often existed alongside other unpaid work, low status just because it *was* women's work, and often it provided entry only to low-prestige employment.

Since retraining was women's work and women were used to juggling multiple occupations in unfavourable circumstances, little attention was paid by the state or by providers. Women had to succeed alongside school leavers and each was thus just another student. For many women, since they were, often for the first time, gaining an education, they were grateful rather than insistent that their work should be acknowledged and assisted. Initially the men who joined retraining were similarly overlooked since they were following in women's footsteps. But like househusbands and male nurses they may help to draw attention to what had been a gendered activity.

The research has suggested that education for occupational change is emerging as a mainstream activity but is still little noticed. Further recognising and researching this aspect of New Zealand life and work is necessary for many individuals to reach their educational and personal goals. Better understanding of education for occupational change is also essential if New Zealand is to move closer towards being a society where lifelong education is integral to everyone's life and work.

Notes

¹ Or was it Harriet Taylor? (From: *The Subjection of Women*, 1869)

² The confusing terminology was covered in Chapter 2. At times the appropriate term maybe community education, education for emancipation, education for (serious) leisure, or, as in Chapter 10, education as recreation.

³ I am referring here to the need for policy to be underpinned by research findings and for the need for such research to be actively sought. There is evidence of some research which does address the issues e.g. Matheson, 1993; Davey, 2001.

⁴ Von Dadelszen adds: "Our approach [to changes in tertiary education] is viewed with caution by many countries and they are reluctant to quote New Zealand examples as our approach might appear too radical to their populations." (1999, p.[9])

⁵ Fewer women are seeking to return to the paid workforce after a long absence. More return after a period of parental leave or continue to work part-time. Such direct re-entry does not therefore contradict arguments about increasing credentialism. In addition, as girls and women study till later ages initially, fewer enter or re-enter the workforce without qualifications.

⁶ Liberal Studies was a University of Canterbury programme. Other New Zealand universities admitted students directly before this date but Canterbury required proof of competency in study at university level. "It was not until 1990 that the right of those 21 and over to enrol at university without provisional admission requirements was enshrined in legislation in New Zealand" (Tobias (2001, p. 58).

⁷ Personal communication: Catriona Cameron, Lincoln University, 21 November 2001; Carolyn Lidgard, University of Canterbury, 23 November 2001. At both universities mature students are high users of these services (at Lincoln being 45% of the users while constituting only 37% of the student population). This may be because of second chance students seeking help or it may reflect post-graduates seeking assistance or, more likely, both of these.

⁸ This is concerning given the evidence, previously cited, that Maori are not attending tertiary institutions in proportion to their representation in the population and the proportion of school-leavers from low decile schools is actually declining. State practice is not providing equally for these students despite policy statements about such intentions.

⁹ In much of its social policy New Zealand, as a small country without the established traditions and entrenched patterns of older countries, has often been a pioneer, although there is debate about whether New Zealand's propensity to switch social policy direction is beneficial. The range of 'pioneering' social policy includes industrial legislation and the franchise for women in the

nineteenth century and social welfare provisions in the 1930s but also the dominance of 'market forces' in employment and welfare policy in the 1980s.

¹⁰ I have chosen not to comment on the reports of the Tertiary Education Advisory Commission which have appeared during 2000 and 2001. While it has made many recommendations as a result of its discussions it will not be clear for some time, until all submissions are in and have been considered, the extent to which the recommendations will affect government policy. I do want to note, in the light of the importance I attribute above to basing policy on research and on the needs of the learners that, as Robert Tobias notes, "Indeed the reports as a whole pay remarkably little attention to teachers and scholars in tertiary education" (Tobias, 2001, p. 54).

¹¹ Another instance is the change among university students from being full-time students during the university year to being full-time students who are also employed, perhaps even 30 hours a week. Similarly the pattern of education as a transitional phase was reflected in the life stages of an apprentice as he (or less likely she) upon completion became an adult worker. The distinct phases are no longer evident in the system of industry trainees.

¹² I make the references to possible demographic and economic consequences in the light of speculation about the effects of the student loan scheme. The suggestions have been made that the introduction of the loan scheme has affected demographic patterns as students, burdened by debt, leave for well-paid jobs overseas and delay child-bearing. Changes in house ownership have been linked to the difficulty of young people getting mortgages while still in debt for their education and similar discussion centres on superannuation and retirement savings. Changes in life patterns likely to produce even more marked changes. They may be responsible for some of the features already mentioned. There is clearly much research to be done, supplementing the Future of Work programme of the Department of Labour, because of the significant implications of these changes.

¹³ That the Virgin Mary actually worked is, however, not acknowledged.

References

- ACACE. (1982). *Continuing education: from policies to practice*. Leicester: Advisory Council for Adult and Continuing Education.
- Armstrong, N. (1992). Handling the hydra: feminist analyses of the state. In R. Du Plessis (Ed.), *Feminist voices* (pp. 224-238). Auckland: Oxford University Press.
- Armstrong, W. (1978). New Zealand; imperialism, class and uneven development. *The Australian and New Zealand Journal of Sociology*, 14(3), 297-303.
- Arthur, E. (1992). England and Wales. In P. Jarvis (Ed.), *Perspectives on adult education and training in Europe* (pp. 256-273). Leicester: NIACE (The national institute of adult continuing education).
- AUS. (2001). E-Learning not so cheap. *AUS Tertiary Update*, 4(12), 1.
- Austrin, T. (1994). Work. In P. Spoonley, D. Pearson, & I. Shirley (Eds.), *New Zealand society: a sociological introduction* (pp. 227-241). Palmerston North: Dunmore Press.
- Austrin, T., & Curtis, B. (1992). The politics of just in time systems: The case of meat processing in New Zealand: 10th International Labour Process Conference.
- Barblan, A. (1995). *Institutional audit of the University of Utrecht* (CRE Auditors' Report). Geneva: The Association of European universities.
- Barker, A. (1995). Standards-based assessment: the vision and broader factors. In R. Peddie & B. Tuck (Eds.), *Setting the standards* (pp. 15-31). Palmerston North: Dunmore Press.
- Barnett, N. (1999, 31 August). Student debt could be a lesson for life. *The Press*, p. 5.
- Barnett, R. (1994). *The limits of competence: knowledge, higher education and society*. Buckingham: The Society for Research into Higher Education and Open University Press.
- Barnett, R. (1997). *Higher education, a critical business*. Buckingham: The Open University.

- Bates, R. (1990). Educational policy and the cult of efficiency. In S. Middleton, J. Codd, & A. Jones (Eds.), *New Zealand policy today* (pp. 40-52). Wellington: Allen & Unwin.
- Beaglehole, J. C. (1937). *The University of New Zealand: an historical study*. Auckland: New Zealand Council for Educational Research.
- Becker, G. S. (1962). Investment in human capital. *Journal of Political Economy*, 70, 9-49.
- Beeby, C. E. (1969). Response on behalf of the honorary graduates, *An official record of the centennial celebrations* (pp. 62-66). Dunedin: University of Otago.
- Beeby, C. E. (1986). Introduction. In W. L. Renwick (Ed.), *Moving targets: six essays on educational policy* (pp. xi-xiv). Wellington: New Zealand Council for Educational Research.
- Beeby, C. E. (1992). *The biography of an idea: Beeby on education*. Wellington: New Zealand Council for Educational Research.
- Benseman, J. (1996). Participation in the fourth sector. In J. Benseman, B. Findsen, & M. Scott (Eds.), *The fourth sector: adult and community education in Aotearoa/New Zealand* (pp. 274-284). Palmerston North: Dunmore Press.
- Blaxter, L., & Tight, M. (1995). Life transitions and educational participation by adults. *International Journal of Lifelong Education*, 14(3), 231-246.
- Blockhuis, F., & Visser, K. (2000). *Jaarboek kwalificatiestructuur*. 's Hertogenbosch: CINOP.
- Borrie, W. D. (1994). *The European peopling of Australasia: a demographic history 1788-1988*. Canberra: Demography programme, Research school of Social Sciences, the Australian National University.
- Boston, J. (1990). The funding of tertiary education. In S. Middleton, J. Codd, & A. Jones (Eds.), *New Zealand policy today* (pp. 161-177). Wellington: Allen & Unwin.
- Boston, J. (1992a). The funding of tertiary education: rights and wrongs. In J. Boston & P. Dalziel (Eds.), *The decent society? Essays in response to National's economic and social policies* (pp. 186-207). Auckland: Oxford University Press.
- Boston, J. (1992b). Redesigning the welfare state. In J. Boston & P. Dalziel (Eds.), *The decent society? Essays in response to National's economic and social policies* (pp. 1-18). Auckland: Oxford University Press.

- Boston, J., & Dalziel, P. (Eds.). (1992). *The decent society? Essays in response to National's economic and social policies*. Auckland: Oxford University Press.
- Brennan, J., Kogan, M., & Teichler, U. (1996a). Higher education and work: A conceptual framework. In J. Brennan, M. Kogan, & U. Teichler (Eds.), *Higher education and work* (pp. 1-24). London: Jessica Kingsley Publishers.
- Brennan, J., Lyon, S., Schomburg, H., & Teichler, U. (1996b). Employment and work of British and German graduates. In J. Brennan, M. Kogan, & U. Teichler (Eds.), *Higher education and work* (pp. 47-98). London: Jessica Kingsley Publications.
- Brocket, M. (2000, 30 October). Students facing a lifetime of debt. *The Press*, p. 7.
- Brookes, B., Macdonald, C., & Tennant, M. (Eds.). (1992). *Women in history 2*. Wellington: Bridget Williams Books.
- Bullock, M. (1973). *Why employ women?* Wellington: Society for Research on Women.
- Butterworth, R., & Tarling, N. (1994). *A shakeup anyway: government and the universities in New Zealand in a decade of reform*. Auckland: Auckland University Press.
- Carleer, G. V., & van Vilsteren, C. A. (1992). Distance education. In S. V. Tobias (Ed.), *Education and employment in Europe 1992: final report of the Great Britain study tour 1991*. Enschede: University of Twente.
- Carter, I. (Ed.). [1994]. *The university and the community*. Auckland: University of Auckland.
- Castells, M. (1996). *The rise of the network society*. Cambridge, Massachusetts: Blackwell.
- Castro, J. (1993). Disposable workers. *Time* (April 19, 1993), 28-29.
- CEDEFOP. (2000a). Digital universities in the pipeline. *CEDEFOP Info*, 2000(3), 11.
- CEDEFOP. (2000b). Monitoring the future of approved prior learning. *CEDEFOP Info*, 2, 15.
- CEDEFOP. (2001). Re-assessing vocational training and qualifications. *CEDEFOP Info*, 1, 16.
- Charnley, A. (1990). What do we know about part-time students? *Adult Learning*, 1(10), 283-284.
- Clark, H. [1984]. The University and Women. In I. Carter (Ed.), *The University and the Community*. Auckland: The University of Auckland.

- Cobban, A. B. (1975). *The medieval universities: their development and organization*. London: Methuen.
- Codd, J. A. (1990a). Educational policy and the crisis of the New Zealand state. In S. Middleton, J. Codd, & A. Jones (Eds.), *New Zealand education policy today* (pp. 191-205). Wellington: Allen & Unwin.
- Codd, J. A. (1990b). Policy documents and the official discourse of the state. In J. Codd, R. Harker, & R. Nash (Eds.), *Political Issues in New Zealand education* (pp. 133-149). Palmerston North: The Dunmore Press.
- Codd, J. A. (1997). Knowledge, qualifications and higher education. In M. Olssen & K. Morris Matthews (Eds.), *Education policy in New Zealand: the 1990s and beyond* (pp. 130-144). Palmerston North: Dunmore Press.
- Coffield, F. (1998). *Learning at work*. Bristol: The Policy Press.
- Coleman, B., Hopkins, J., Matheson, R., Rivers, S., & Waaka, A. (1993). *Recognition of prior learning in the social services: personal, political and cultural issues*. Paper presented at the NZQA RPL Conference, Wellington.
- Crean, M. (1995, 16 August). Brief tenure jobs rule market. *The Press*, p. 5.
- Creech, W. (1997). Foreword, *A future tertiary education policy for New Zealand (green paper)* (pp. 3-4). Wellington: Ministry of Education.
- Creech, W. (1998). *Foreword*. Ministry of Education. Available: www.minedu.govt.nz/web/document_page.cfm?id=4715 [2001, 10 December].
- Dakin, J. (1996). Looking back. In J. Benseman, B. Findsen, & M. Scott (Eds.), *The fourth sector: adult and community education on Aotearoa/New Zealand* (pp. 19-21). Palmerston North: Dunmore.
- de Weert, E. (1996). Responsiveness of higher education to labour market demands: curriculum change in the humanities and social sciences. In J. Brennan, M. Kogan, & U. Teichler (Eds.), *Higher education and work* (pp. 25-46). London: Jessica Kingsley Publishers.
- Dearing, R. (1997). *Higher education in the learning society (The Dearing Report)*. London: The National Commission into Higher Education.
- Department for Education and Employment. (1995). *Lifetime learning - a consultative document*. London: HMSO.

- Department for Education and Employment. (1996). *Lifetime learning: a policy framework*. Sheffield: Department for Education and Employment, United Kingdom.
- Department for Education and Employment. (1998). *The learning age: a renaissance for a new Britain* (Government Green Paper). London: HMSO.
- Department of Education. (1944). *Report of the consultative committee on post-primary education (Thomas Report)*. Wellington: Government Printer.
- Department of Education. (1962). *Report of the Commission on Education in New Zealand (Currie Report)*. Wellington: Government Printer.
- Department of Education. (1985). *A new deal in training and employment opportunities*. Wellington: Government Printer.
- Department of Education. (1988). *Report on post-compulsory education and training in New Zealand (Hawke Report)*. Wellington: Government Printer.
- Department of Education. (1989). *Learning for life*. Wellington: Government Printer.
- Department of Education and Science. (1991). *Education for adults*. London: Her Majesty's Stationary Office.
- Department of Labour. (1985). *Skills for young people: a discussion document on education and training*. Wellington: Government Printer.
- Department of Labour. (1987a). *Access transition education and training: the right way to work*. Wellington: Government Printer.
- Department of Labour. (1987b). *Further education and training: who should pay?*. Wellington: Department of Labour.
- Department of Labour. (1989). *Labour employment gazette*. Wellington: Department of Labour.
- Department of Labour. (1999). *Human capability: a framework for analysis*. Wellington: New Zealand Government.
- Department of Labour. (2000). *Workforce 2010*. Department of Labour. Available: www.dol.govt.nz/w2010%20summary.pdf.
- Dex, S., & McCulloch, A. (1995). *Flexible employment in Britain: a statistical analysis*. Manchester: Equal Opportunities Commission.
- Doets, C., Hake, B., & Westerhuis, A. (2000). *Lifelong learning and VET in the Netherlands: the state of the art in 2000*. 's Hertogenbosch: CINOP.

- Dougherty, I. (1999). *Bricklayers and mortarboards: a history of New Zealand polytechnics and institutes of technology*. Palmerston North: Dunmore.
- Dwyer, M. (2000). *Options for improving information on job-related education and training*. Wellington: Department of Labour.
- Dwyer, T. (1984). It went that-a-way?: the state response to unemployment. In C. Wilkes & I. Shirley (Eds.), *In the public interest: health, work and housing in New Zealand* (pp. 134-151). Auckland: Benton Ross.
- Easton, B. H. (1995). The commercialization of tertiary education. In J. Marshall (Ed.), *The economics of education*. Auckland: University of Auckland.
- Easton, B. H. (1997). A permanent revolution? Zealots and common sense. *New Zealand Studies*(July), 30-36.
- Education Directions Ltd. (2001). *A statistical profile of the PTE sector: a report for the Tertiary Education Advisory Commission*. Wellington: Education Directions Ltd.
- Ehrensaft, P., & Armstrong, W. (1978). Dominion capitalism: a first statement. *The Australian and New Zealand Journal of Sociology*, 14(3), 352-363.
- Ekstrom, R. B. (1983). Assessing prior learning experiences. *New Directions for Testing and Measurement*, 17, 69-79.
- Elliott, D. (1998). Internationalizing British higher education: policy perspectives. In P. Scott (Ed.), *The globalization of higher education* (pp. 32-43). Buckingham: SHRE & Open University Press.
- Elsy, B. (1994). *Social theory perspectives on adult education*. Christchurch: Seminar, University of Canterbury.
- Employment Department Group. (1993). *Prosperity through skills: a statement from the secretary of state for employment on his vocation and training strategy for Great Britain*. Sheffield: Employment Department.
- Employment Department Group. (1994). *Training in Britain: a guide* (PL947): Employment Department.
- ERAU. (1995). Adult admission entrants revisited. *ERAU News*, 1995(3), 1.
- F.U.W. (1976). *Women at home: a New Zealand survey*. Wellington: NZ Federation of University Women.
- Fargher, R. (1985). Continuing education and New Zealand society: past and future. In N. Zepke & L. Webber (Eds.), *Continuing education in New Zealand: a record of*

- issues and ideas 1972- 85.* (pp. 8-19). Lower Hutt: Association of Teachers in Technical Institutes.
- Fargher, R., & Probine, M. (1988). *The management, funding and organisation of continuing education and training.* Wellington: Department of Education.
- Fetterman, D. W. (1991). A walk through the wilderness. In W. B. Shaffir & R. A. Stebbins (Eds.), *Experiencing fieldwork* (pp. 87-96). Newbury Park: Sage.
- Findsen, B. (1996). The education of adult and community educators. In J. Benseman, B. Findsen, & M. Scott (Eds.), *The fourth sector: adult and community education on Aotearoa/New Zealand* (pp. 297-284). Palmerston North: Dunmore Press.
- Fitzsimons, P. (1997). Human capital theory and participation in tertiary education in New Zealand. In M. Olssen & K. Morris Matthews (Eds.), *Education policy in New Zealand: the 1990s and beyond* (pp. 107-129). Palmerston North: Dunmore.
- Fitzsimons, P., & Frater, P. (1996). The seamless education system and private training establishments: an investigation of the consequences for private training establishments of possible changes to the EFTS funding system . unpublished paper: cited in Olssen & Morris Matthews (Eds.), (1979), p. 20.
- Ford, J., Bosworth, D., & Wilson, R. (1995). Part-time work and full-time higher education. *Studies in Higher Education*, 20(2), 187-202.
- Friedrichs, J., & Ludtke, H. (1975). *Participant observation.* Farnborough, Hants.: Saxon House.
- Fuller, R., & Petch, A. (1995). *Practitioner research: the reflexive social worker.* London: Open University Press.
- Furey, V. (1980, 4 March). Christchurch's insatiable appetite for education. *The Press*, p. 17.
- Galbraith, J. K. (1996). The culture of contentment. *Listener* (November 30), 32-37.
- Gardner, W. J., Beardsley, E. T., & Carter, T. E. (1973). *A history of the University of Canterbury.* Christchurch: The University of Canterbury.
- Glaser, B. G., & Strauss, A. L. (1968). *The discovery of grounded theory: strategies for qualitative research.* (Alternative edition 1967 Chicago Aldine Publishing Company ed.). London: Weidenfeld and Nicholson.
- Gobbi, M. (1998). Participation in post-compulsory education and training. *Labour Market Bulletin*, 1 & 2, 108-126.

- Goffman, E. (1959). *The presentation of self in everyday life*. Garden City, N.Y.: Doubleday.
- Golden, L. (1993). Response to Jonathon Gershuny, 'Are we running out of time?'. *Futures*, 24, 203-205.
- Gooderham, P., & Dale, M. (1995). The second-rate second chance? A comparison of the fates of mature graduates in the labour market in Britain and Norway. *International Journal of Lifelong Education*, 14(1), 3-21.
- Gordon, L. (1990). The right way to work: the development of the Access training programme. In S. Middleton, J. Codd, & A. Jones (Eds.), *New Zealand education policy today* (pp. 178-190). Wellington: Allen & Unwin.
- Gorz, A. (1989). *Critique of economic reason*. London: Verso.
- Grace, G. (1990). The New Zealand Treasury and commodification of education. In S. Middleton, J. Codd, & A. Jones (Eds.), *New Zealand education policy today* (pp. 27-39). Wellington: Allen & Unwin.
- Gramsci, A. (1957). *The modern prince and other writings* (Louis Marks, Trans.). New York: International Publishers.
- Haines, L. (1989). *Work today: employment trends to 1989*. Wellington: NZ Planning Council.
- Hall, D. O. W. (1970). *New Zealand adult education*. London: Michael Joseph.
- Handy, C. (1989). *The age of unreason*. London: Business Books.
- Hansen, P. (1987). *Women's employment issues: New Zealand 1967-1987*. Wellington: Department of Labour.
- Hargreaves, R. P., & Hearn, T. J. (Eds.). (1986). *Women and the vote*. Dunedin: The Hocken Library.
- Harman, G. (1997). The Dearing report. *Campus Review* (August 13), 12.
- Harman, G. (1998). Economics makes its market. *Campus Review* (February 11), 5.
- Harvey, D. (1989). *The condition of post modernity: an enquiry into the origins of cultural change*. Cambridge, Massachusetts: Blackwell.
- Hatton, M. J. (1997). A pure theory of lifelong learning. In M. J. Hatton (Ed.), *Lifelong learning: policies, practices and programs* (pp. 360-372). Toronto: Apec Publication.

- Hercus, A. (1984). The changing structure of the New Zealand family and implications for family policy. *Women's Studies Assn Conference Papers 1983*, 224-230.
- Higgins, J. (1993). *Beyond the ideology of upskilling: the theory and practice of skill trends analysis*. Unpublished Ph.D., University of Otago, Dunedin.
- Hill, R., Couchman, P., & Gidlow, B. (1994). Work and technology. In P. F. Green (Ed.), *Studies in New Zealand social problems* (2nd ed., pp. 298-321). Palmerston North: Dunmore Press.
- Hillman, J. (1998). 'The learning age': agenda for lifelong learning? *Political Quarterly*, 69(3), 312-317.
- Hockley, D. (1990). *Packed but not padded: Christchurch Polytechnic's first twenty-five years*. Christchurch: The Caxton Press.
- Hodgson, A., & Spours, K. (2001). Part-time work and full-time education in the UK: the emergence of a curriculum and policy issue. *Journal of Education and Work*, 14(3), 373-388.
- Hofstede, G. (1984). *Culture's consequences, international differences in work-related values*. Beverly Hills: Sage.
- Hogben, G. (1912). AJHR.
- Hogeschool van Utrecht. (1995). Information brochure. Utrecht: Hogeschool van Utrecht.
- Hollenstein, H. (1987). Economic performance and the vocational qualifications of the Swiss labour force compared with Britain and Germany . Quoted in T. Becher *British Higher Education*. London : National Institute of Economic and Social Research.
- Hood, D. (1994). quoted in. *Learn*(1), 40.
- Hood, D. (1995). Address to the Principals' Forum, 1995 . Wellington: Training Centre, National Archives.
- Hoogvelt, A. M. (1978). *The sociology of developing societies*. London: Macmillan.
- Houle, C. O. (1961). *The enquiring mind*. Madison: University of Wisconsin Press.
- Houtkoop, W., & van der Kamp, M. (1990). *Adult education in the 1990s: the case of the Netherlands*. Paper presented at the AAACE Conference.
- Hughes, B. (1978). Women students in universities : Unpublished manuscript.

- Hunter, T. (1940). *The place of the university in the first hundred years*. Auckland: Auckland University College.
- Husen, T. (1974). *The learning society*. London: Methuen.
- Husen, T. (1979). *The school in question*. Oxford: Oxford University Press.
- Hyman, P. (1980). Women's labour force participation in New Zealand today and tomorrow. *Women's Studies Conference Papers 1980*, 6-16.
- IRDAC. (1990). *Skills shortages in Europe*. Brussels: Industrial Research and Development Advisory Committee of the European Communities.
- Jesson, B. (1988). The libertarian right. In B. Jesson, A. Ryan, & P. Spoonley (Eds.), *Revival of the right* (pp. 30-55). Auckland: Heinemann Reed.
- Jesson, B. (1989). *Fragments of labour*. Auckland: Penguin.
- Jones, M., Sharma, R., & Thompson, S. (1993). RPL: building equity into the assessment model. *JIRA*, 2(1), 54-64.
- Jones, S. (1996). Managing curriculum development. In J. Brennan, M. Kogan, & U. Teichler (Eds.), *Higher education and work* (pp. 136-160). London: Jessica Kingsley Publishers.
- Jorgensen, D. L. (1989). *Participant observation*. (Vol. 15). Newbury Park, California: Sage.
- Keast, J. (2001, 16 April). Maritime marriage. *The Press*, p. 22.
- Kennedy, L. (1969). Women in paid employment, *The changing role of women* (pp. 23-27). Hamilton: SROW (Waikato).
- Ker, P. (1993). *Implementing procedures for the recognition of prior learning: issues arising from a pilot programme at Auckland Institute of Technology*. Paper presented at the NZQA RPL Conference, Wellington.
- Keynes, J. M. (1972) [1930]. Economic possibilities for our grandchildren, *The collected writings of John Maynard Keynes. Vol. IX: essays in persuasion* (pp. 321-332). London/ Basingstoke: Macmillan.
- Knapp, J., & Gardiner, M. (1981). Assessment of prior learning: as a model and in practice. *New Directions for Experiential Learning*, 14, 7-31.
- Köln charter. (1999). *Aims and ambitions for lifelong learning*. G8 nations. Available: <http://www.g8cologne.de> [1999, 19 June 1999].

- Kraayvanger, G. (1995). Work and learning-shifts over time. Lifespans, careers and learning careers. In G. Kraayvanger, F. van der Krogt, T. Reubsaet, & J. Warmerdam (Eds.), *Work and learning: opportunities and risks*. Nijmegen: University of Nijmegen.
- Kuiper, A. C. (1986). *Women in apprenticeships*. Christchurch: Christchurch Polytechnic.
- Kuiper, A. C. (1994). *Recognising prior learning*. Christchurch: Christchurch Polytechnic.
- Kuiper, A. C., & Pattison, J. (1989). *Working your way back to work: a guide for New Zealand women*. Auckland: Heinemann Reed.
- Lafferty, G. (1995). *Equity, access and independent learning: maximising opportunities for mature age students* (Occasional Paper Publication No. 5). Brisbane: Griffith University.
- Lauder, H. (1990). The new right revolution and education in New Zealand. In S. Middleton, J. Codd, & A. Jones (Eds.), *New Zealand education policy today* (pp. 1-26). Wellington: Allen & Unwin.
- Lauder, H., & Hughes, D. (1990). Social origins, destinations and educational inequality. In J. Codd, R. Harker, & R. Nash (Eds.), *Political issues in New Zealand education* (pp. 43-60). Palmerston North: The Dunmore Press.
- Law, M. (1996). Workers' education and training in a new environment. In J. Benseman, B. Findsen, & M. Scott (Eds.), *The fourth sector: adult and community education in Aotearoa/New Zealand* (pp. 159-176). Palmerston North: Dunmore Press.
- Le Heron, R., & Pawson, E. (Eds.). (1996). *Changing places: New Zealand in the nineties*. Auckland: Longman Paul.
- Lengrand, P. (1970). *An introduction to lifelong education*. Paris: UNESCO.
- Levine, A. (2000, 13 March). The soul of a new university. *New York Times*, pp. 1-4.
- Lincoln University. (2000). *Lincoln University student satisfaction survey*. Christchurch: Lincoln University.
- Lofland, J., & Lofland, L. H. (1984). *Analyzing social settings: a guide to qualitative observation and analysis*. (Second ed.). Davis: Wadsworth.
- Longworth, N., & Davies, W. K. (1996). *Lifelong learning*. London: Kogan Page.

- Lovell-Smith, M. (Ed.). (1992). *The women question: writings by the women who won the vote* (1st ed.). Auckland: New Women's Press.
- Lynch, J. (1991). *Four case studies on courses for women in New Zealand polytechnics*. Wellington: Ministry of Education.
- Lythe, D. (1993). High skills - the strategic investment for the nineties. *Framework Update*, 5, 2.
- Maani, S. (1997). *Investing in minds: the economics of higher education in New Zealand*. Wellington: Institute of Policy Studies, Victoria University of Wellington.
- Maharey, S. (2000). Introduction. In Tertiary Education Advisory Commission (Ed.), *Nation-Building: lifelong learning in a knowledge society*. Wellington: Ministry of Education.
- Mannion Brunt, J. (1999). Employer involvement in lifelong learning. In P. Oliver (Ed.), *Lifelong learning and continuing education. What is a learning society?* (pp. 215-230). Aldershot: Ashgate.
- Manthei, M. (1993). *Ten years on: the effect of the New Outlook course on women's lives*. Christchurch: Christchurch Polytechnic.
- Marcuse, P. (2000). The language of globalization. *Monthly Review*, 52 (3), 23-27.
- Marginson, S. (1993). *Education and public policy in Australia*. Melbourne: Cambridge University Press.
- Marginson, S. (1995). The economics of education: subjects and subjugation. In J. Marshall (Ed.), *The economics of education* (pp. 5-17). Auckland: University of Auckland.
- Marginson, S. (1996). Competition in higher education in the post-Himler era. *Academic Quarterly*, 68 (4), 23- 35.
- Marginson, S. (1997). *Educating Australia: government, economy and citizen since 1960*. Melbourne: Cambridge University Press.
- Marshall, J. D. (Ed.). (1995). *The economics of education*. Auckland: The University of Auckland.
- Martin, I. (1999). Lifelong learning: stretching the discourse. In P. Oliver (Ed.), *Lifelong and continuing education. What is a learning society?* (pp. 181-194). Aldershot: Ashgate.

- Martin, J. (1988). *Second chance*. Melbourne: Penguin Books.
- Matheson, R.. (1993). *Gender Equity in a polytechnic*. Unpublished Masters thesis. Hamilton: University of Waikato.
- McCulloch, G. (1990). The ideology of educational reform: an historical perspective. In S. Middleton, J. Codd, & A. Jones (Eds.), *New Zealand education policy today* (pp. 53-67). Wellington: Allen & Unwin.
- McDougall, J., & Gunn, C. (1992). *Recognising prior learning: guidelines in policy development*. Nelson: Nelson Polytechnic for NZQA.
- McGeorge, C. (1987). How Katy did at school. *New Zealand Journal of Educational Studies*, 22(1), 101-111.
- Meade, A., & Kuiper, A. C. (1981). *Women and money*. Johnsonville: Society for Research on Women.
- Meikle, P. (Ed.). (1976). *United women's convention, 1975*. Wellington: United Women's Convention.
- Merrill, B. (1999). Degrees of adult participation: lifelong learning in European universities. In P. Oliver (Ed.), *Lifelong and continuing education. What is a learning society?* (pp. 9-30). Aldershot: Ashgate.
- Methven, P. J., & Hansen, J. J. (1997). Half a revolution: a brief survey of lifelong learning in New Zealand. In M. J. Hatton (Ed.), *Lifelong learning: policies, practices and programs* (pp. 2-17). Toronto: APEC.
- Middleton, S. (1988). Towards a sociology of women's education in Aotearoa. In S. Middleton (Ed.), *Women and education in Aotearoa*. (pp. 174-198). Wellington: Allen & Unwin.
- Middleton, S., Jones, A., & Codd, J. A. (1990). Introduction. In S. Middleton, J. A. Codd, & A. Jones (Eds.), *New Zealand education policy today* (pp. vii-xii). Wellington: Allen and Unwin.
- Mill, J. S. (1989) [1869]. *On liberty and other writings*. Cambridge: Cambridge University Press.
- Miller, S. (1979). Equal rights. In C. Newman (Ed.), *Canterbury women since 1893* (pp. 98-111). Christchurch: Pegasus.
- Ministerial Consultative Group. (1994). Funding growth in tertiary education and training, (*The Todd Report*). Wellington: Ministry of Education.

- Ministerie van Onderwijs Cultuur en Wetenschap. (2000). *National programme for 'Lifelong Learning'*. Ministerie van Onderwijs, Cultuur en Wetenschap. Available: www.minocw.nl/english/press/e9802.html [2000, 15 December].
- Ministry of Education. (1993). *Education for the twenty-first century: a discussion document*. Wellington: Government Printer.
- Ministry of Education. (1994). *Education for the twenty-first century*. Wellington: Government Printer.
- Ministry of Education. (1997). *A future tertiary education policy for New Zealand: tertiary education review*. Wellington: Ministry of Education.
- Ministry of Education. (1998a). *New Zealand tertiary education sector: profile and trends*. Wellington: Ministry of Education.
- Ministry of Education. (1998b). *Tertiary education in New Zealand: policy directions for the 21st century (white paper)*. Wellington: Ministry of Education.
- Ministry of Women's Affairs. (1999). *Briefing to the incoming Minister*. Wellington: Ministry of Women's Affairs.
- Moiser, T. (2001, 12 May). Maureen Titheridge. *The Press*, p. C1.
- Montgomerie, D. (1992). Man-powering women: industrial conscription during the second world war. In B. Brookes, C. Macdonald, & M. Tennant (Eds.), *Women in History 2* (pp. 184-204). Wellington: Bridget Williams Books.
- Moore, M. (1993). *Let's get New Zealand working again*. Wellington: New Zealand Labour Party.
- Moreland, R. (1999). Towards a learning society: the role of formal, non-formal and informal learning. In P. Oliver (Ed.), *Lifelong and Continuing Education. What is a learning society?* (pp. 159-180). Aldershot: Ashgate.
- MoRST. (1998). *Building tomorrow's success: guidelines for thinking beyond today. The Foresight Project*. Wellington: Ministry of Research Science and Technology.
- Mulgan, R. (1988a, 6 April). University open entry holds key to equal opportunity. *National Business Review*, pp. 11.
- Mulgan, R. (1988b, 8 November). Varsity system unique. *National Business Review*, pp. 6-7.
- Murdoch, J. R. (1943). *The high schools of New Zealand*. Wellington: NZCER.

- N.C.W. (1974). *What price equality? Women and work in New Zealand*. Dunedin: National Council of Women.
- N.O.W. (1972). July Newsletter . Christchurch: National Organisation for Women.
- New Zealand Treasury. (1984). *Economic management: briefing papers for the incoming government*. Wellington: NZ Treasury.
- New Zealand Treasury. (1987). *Government management: brief to the incoming government, 1987 Vol II: education issues*. Wellington: NZ Treasury.
- Newman, J. H. C. (1960) [1952]. *The idea of a university*. New York: Holt, Rhinehart and Winston.
- Nicol, J. (1940). *The technical schools in New Zealand: an historical survey*. Wellington: New Zealand Council for Educational Research.
- Nightingale, P. (1997). Submission to the Review of Higher Education Financing and Policy, April 1997. *HERDSA News*, 19(1), 1-4.
- Nolan, M. (2000). *Breadwinning: New Zealand women and the state*. Christchurch: Canterbury University Press.
- NZQA. (1991). *Designing a framework: a discussion document about restructuring national qualifications*. Wellington: New Zealand Qualifications Authority.
- NZQA. (1992). *Learning to learn: an introduction to the New Zealand qualifications framework*. Wellington: New Zealand Qualifications Authority.
- NZQA. (2000, October 2000). Anniversary marks new era for New Zealand Qualifications Authority. *QA News*, 35, 4-5.
- NZUSA. (2001). The student loan scheme: inequities and emerging issues. Wellington: New Zealand University Students Association.
- NZVCC. (1998). *University graduate destinations 1998* (Survey report 2). Wellington: New Zealand Vice Chancellors' Committee.
- NZVCC. (1999). *University graduate destinations 1999* (Survey report 3). Wellington: New Zealand Vice Chancellors' Committee.
- NZVCC. (2000a). *Annual Report 1999* (Annual report). Wellington: New Zealand Vice Chancellors' Committee.
- NZVCC. (2000b). *University graduate destinations 2000* (Survey report 4). Wellington: New Zealand Vice Chancellors' Committee.
- Oakley, A. (1982). *Subject Women*. Glasgow: Fontana.

- O'Brien, D. (2000, 26 March). untitled. *The Chronicle of Higher Education*.
- O'Brien, M., & Wilkes, C. (1993). *The tragedy of the market: a social experiment in New Zealand*. Palmerston North: Dunmore Press.
- O'Regan, K. V. (1990). *National choice, equity and independence for women*. Wellington: NZ National Party.
- Observer Review. (1995, 5 November 1995). Class keeps school in a state. *The Observer*, p. 3.
- OECD. (1983). *Review of national policies for education, New Zealand*. Paris: Organisation for Economic Co-operation and Development.
- OECD. (1992). *Reviews of national policies for education: Netherlands*. Paris: Organisation for Economic Co-operation and Development.
- OECD. (1995). The changing role of vocational education and training: (VOTEC) draft conference report. Paris: Organisation for Economic Co-operation and Development.
- OECD. (1996, 1996). *Lifelong learning for all*. Paper presented at the Meeting of the Education Committee at Ministerial Level, 16-17 January, Paris.
- OECD. (1998). *Redefining tertiary education*. Paris: Organisation for Economic Co-operation and Development.
- OECD. (2000). *Education at a glance: OECD indicators education and skills*: Organisation for Economic Co-operation and Development.
- Office of the Auditor General. (2000). *Student loan scheme - publicly available accountability information*. Wellington: Office of the Auditor General.
- Oliver, P. (1999). The concept of lifelong learning. In P. Oliver (Ed.), *Lifelong and continuing education. What is a learning society?* (pp. 1-8). Aldershot: Ashgate.
- Open Universiteit. (1995). *Cursuscatalogus 1995/1996*. Heerlen: Open Universiteit.
- Open Universiteit. (2000). *Programme information*. Open Universeit. Available: www.ou.nl.
- Page, D. (1992). The first lady graduates: women with degrees from Otago University, 1885-1900. In B. Brookes, C. Macdonald, & M. Tennant (Eds.), *Women in History 2* (pp. 98-128). Wellington: Bridget Williams Books.
- Papadopoulos, G. (1994). *Education 1960 - 1990: the OECD perspective*. Paris: OECD.

- Parton, H. (1979). *The university of New Zealand*. Dunedin: Auckland University Press and Oxford University Press.
- Peet, R. (1991). *Global capitalism: theories of societal development*. (1st ed.). London and New York: Routledge.
- Penn, R. (1985). *Skilled workers in the class structure*. Cambridge: Cambridge University Press.
- Peters, M., & Roberts, P. (1999). *University futures and the politics of reform in New Zealand*. Palmerston North: Dunmore Press.
- Polanyi, M. (1972). *Personal knowledge: towards a post-critical philosophy*. London: Routledge & Kegan Paul.
- Pool, I. (1987). New Zealand universities until 2007: demographic structures and changes. In R. Watts et al. (Ed.), *Report of the universities review committee: New Zealand's universities: partners in national development*. Wellington: New Zealand Vice Chancellors Committee.
- Power, S., Halpin, D., & Whitty, G. (1997). Managing the state and the market: 'new' education management in five countries. *British Journal of Educational Studies*, 45(4), 342-362.
- Press, E., & Washburn, J. (2001, January/February). Digital diplomas. *Mother Jones*, pp. 34-83.
- Price, F. (1981, 8 June). 'New Outlook' opens doors to wider world. *New Zealand Woman's Weekly*, p. 23.
- Renwick, W. L. (1981). *The dividing line between universities and other tertiary education sectors*. Paper presented at the Universities into the Twenty-First Century Conference, Hamilton.
- Renwick, W. L. (1986a). *Moving targets: six essays on educational policy*. Wellington: New Zealand Council for Educational Research.
- Renwick, W. L. (1986b). Rights to education. In W. L. Renwick (Ed.), *Moving targets: six essays on educational policy*. Wellington: New Zealand Council for Educational Research.
- Research Advisory Group of NACEW. (1990). *Beyond the barriers: the state, the economy and women's employment 1984-1990*. (1st ed.). Wellington: Department of Labour.

- Rikowski, G. (1992). *Working for leisure? Part-time and temporary working amongst A level and BTEC students at Epping Forest College*. London: Division of Humanities and Modern Languages, Epping Forest College.
- Rivers, J. (2000, 2 June). Positive education report. *New Zealand Education Review*, p. 6.
- Rowe, R. (2000, 31 March). Wild speculation. *New Zealand Education Review*, p. 5.
- Rubenson, K. (1989). The sociology of adult education. In S. Merriam & P. Cunningham (Eds.), *Handbook of adult and continuing education* (pp. 51-69). San Francisco: Jossey-Bass.
- Sadlak, J. (1998). Globalization and concurrent challenges for higher education. In P. Scott (Ed.), *The globalization of higher education* (pp. 100-112). Buckingham: The Society for Research into Higher Education and the Open University Press.
- Sargant, N. (1991). *Learning and leisure: a study in learning and its policy implications*. Leicester: NIACE.
- Schuller, T., Raffae, D., Morgan-Klein, B., & Clark, I. (1999). *Part-time higher education: policy, practice and experience*. London: Jessica Kingsley Publishers.
- Scott, P. (1995). *The meanings of mass higher education*. Buckingham: The Society for Research into Higher Education / Open University Press.
- Scott, P. (Ed.). (1998a). *The globalization of higher education*. Buckingham: The Society for Research into Higher Education and the Open University Press.
- Scott, P. (1998b). Massification, internationalization and globalization. In P. Scott (Ed.), *The globalization of higher education* (pp. 108-129). Buckingham: The Society for Research into Higher Education and the Open University Press.
- Select Committee on Women's Rights. NZ House of Representatives. (1975). *The role of women in New Zealand society*. Wellington: Government Printer.
- Shaffir, W. B., & Stebbins, R. A. (Eds.). (1991). *Experiencing fieldwork: an inside view of qualitative research*. Newbury Park: Sage Publications.
- Shipley, S. (1982a). Women's unemployment. *Women's Studies Association Conference Papers 1981*, 15-20.
- Shipley, S. M. (1982b). *Women's employment and unemployment: a research report*. Palmerston North and Wellington: Department of Sociology, Massey University and The Society for Research on Women, Wellington.

- Shirley, I., Easton, B., Briar, C., & Chatterjee, S. (1990). *Unemployment in New Zealand*. Palmerston North: Dunmore Press.
- Simpson, T. (1990). *The slump: the thirties depression: its origins and aftermath*. Auckland: Penguin.
- Smith, A. (1979). *The wealth of nations*. Harmondsworth: Penguin.
- Smith, L. (1996, 3 January). Qualifications Framework finds out what students know. *New Zealand Herald*, p. 6.
- Snook, I. (1994). The myth of the skills crisis. Unpublished mamnuscript: Christchurch Polytechnic.
- Spradley, J. (1980). *Participant Observation*. New York: Holt, Rinehart and Winston.
- SROW. (1969). *The changing role of women*. Hamilton: SROW, Waikato Branch.
- SROW. (1972). *Urban women*. Wellington: Society for Research on Women in New Zealand.
- SROW. (1976). *Career, marriage and family*. Wellington: Society for Research on Women in New Zealand, Wellington.
- Stark, D. (1980). Class struggle and the transformation of the labour process. *Theory and Society*, 9, 89-130.
- Statistics New Zealand. (1996). *Education and training survey*. Wellington: Statistics New Zealand.
- Statistics New Zealand. (1997). *Census 96: national summary*. Wellington: Statistics New Zealand.
- Statistics New Zealand. (1998a). *Census 96: education*. Wellington: Statistics New Zealand.
- Statistics New Zealand. (1998b). *Census 96: employment and unemployment*. Wellington: Statistics New Zealand.
- Statistics New Zealand. (2000). *New Zealand time use survey data*. (February, 2000 ed.). Wellington: Statistics New Zealand/Ministry of Women's Affairs.
- Stephens, R. (1995). Evaluating the Todd report on tertiary education. In J. Marshall (Ed.), *The economics of education* (pp. 50-72). Auckland: University of Auckland.

- Stephens, R. (1997). Financing tertiary education. In M. Olssen & K. Morris Matthews (Eds.), *Education policy in New Zealand: the 1990s and beyond* (pp. 190-208). Palmerston North: Dunmore Press.
- Stephens, R., & Boston, J. (1994). Financing tertiary education: an evaluation of the Todd report. *New Zealand Annual Review of Education*, 109-135.
- Stubbs, W. (1995). Interview with Kim Hill, 12 April 1995. Wellington: APNZ.
- Sutch, W. B. (1964). *Women's contribution in a changing society*. Wellington: Department of Industries and Commerce.
- Taskforce for Improving Participation in Tertiary Education. (1999). *Report of the Taskforce for Improving Participation in Tertiary Education*. Auckland: University of Auckland.
- Tawney, R. H. (1953). *The workers' educational organisation and adult education*. London: Athlone.
- Taylor, D. (Ed.). (1985). *Women a world report: a new internationalist book* (1st ed.). London: Methuen.
- TEAC. (2001). *Shaping the funding framework: fourth report of the Tertiary Education Advisory Commission*. Wellington: Tertiary Education Advisory Commission.
- The Economist. (1997, 4 October). A survey of universities: The knowledge factory. *The Economist*, pp. 1-24.
- The Oxford English Dictionary. (1978). Oxford: The Clarendon Press.
- Thorns, D. C. (1992). *Fragmenting societies? A comparative analysis of regional and urban development*. London: Routledge.
- Titmus, C. J. (1989). *Lifelong education for adults: an international handbook*. Oxford and New York: Pergamon.
- Tobias, R. (1996). What do adult and community educators share in common? In J. Benseman, B. Findsen, & M. Scott (Eds.), *The fourth sector: adult and community education on Aotearoa/New Zealand* (pp. 38-64). Palmerston North: Dunmore.
- Tobias, R. (1997). Universities' contributions to adult and community education - the past decade. *Akina, The bulletin for the adult and community education association / Aotearoa / New Zealand*, 53, 10-15.

- Tobias, R. (1999). Lifelong learning under a comprehensive national qualifications framework - rhetoric and reality. *International Journal of Lifelong Education*, 18(2), 110-118.
- Tobias, R. (2001). Lifelong learning and the university in the 21st century: Part 3 a New Zealand perspective. *Unpublished manuscript*, 42-64.
- Trow, M. (1973). *Problems in the transition from élite to mass higher education*. Berkeley, CA: Carnegie Commission on Higher Education.
- Tuck, B. (1994). Generally fine but occasionally overcast with possibility of thunder and lightning: a year in the life of the New Zealand Qualifications Authority. In H. Manson (Ed.), *New Zealand annual review of education*. Wellington: Faculty of Education, Victoria University of Wellington.
- Tuckett, A. (1995). Putting a toe in the water: General adult education as a pathway to vocational learning. *Journal of Adult Learning*, 23(1), 5-23.
- Turner, H. (1962). *Trade union growth, structure and policy: a comparative study of the cotton unions*. London: Allan and Unwin.
- Turner, V. W. (1973). *The forest of symbols: aspects of Ndembu ritual*. Ithaca [N.Y.]: Cornell University Press.
- Universiteit Utrecht (1994). *Universiteit Utrecht*. Utrecht: Universiteit Utrecht.
- University of Leicester (1995). *Undergraduate prospectus*. Leicester: University of Leicester.
- Usher, R. (1999). Identity, risk and lifelong learning. In P. Oliver (Ed.), *Lifelong and continuing education: What is a learning society?* (pp. 65-82). Aldershot: Ashgate.
- V.T.C. (1986). *Women's training and child care: a study of the Christchurch Polytechnic child care unit users*. Wellington: Vocational Training Council.
- van der Ree, Y. (1994). *Vocational training centres for women: WVTC handbook*. Assen: Anke Weidemeschool.
- van Gennep, A. (1960). *The rites of passage*. Chicago: University of Chicago Press.
- van Gent, B. (1992). The Netherlands. In P. Jarvis (Ed.), *Perspectives on adult education and training in Europe* (pp. 19-34). Leicester: NIACE (The National Institute of Adult Continuing Education).

- Venables, P. (1976). *Report of the Committee on Continuing Education*. Milton Keynes: Open University.
- Visser, H. (1999). A profile of participants in school-based community education: Results of a 1996 survey. *The Research Bulletin*, 10, 97-106.
- von Dadelszen, J. (1999). *New Zealand and the OECD*. Wellington: Ministry of Education.
- W.E.A. (1922). *Annual report*. Wellington: New Zealand Worker's Educational Association.
- Walby, S. (1989). Flexibility and the changing sexual division of labour. In S. Wood (Ed.), *The transformation of work?* (pp. 102-126). London: Unwin Hyman.
- Waller, J. (2001, 19 March). Back to school. *New Zealand Women's Weekly*, pp. 23-24.
- Waring, M. (1983, 7 May). Invisible women. *Listener*, p. 74.
- Waring, M. (1988). *Counting for nothing*. Wellington: Allen and Unwin and Port Nicholson Press.
- Webb, E. J., Campbell, D. T., Schwarz, R. D., & Sechrest, L. (1966). *Unobtrusive measures: nonreactive research in the social sciences*. Chicago: Rand McNally.
- Williams, B. M. (1978). *Structures and attitudes in New Zealand adult education, 1945 - 75*. Wellington: New Zealand Council for Educational Research.
- Wilson, M. (1984). Workers, the state and social policy: industrial legislation in N.Z. In C. Wilkes & I. Shirley (Eds.), *In the public interest*. Auckland: Benton Ross.
- Wilson, M. (1989). *Labour in government 1984-1987*. Wellington: Allen & Unwin and Port Nicholson Press.
- Women's Advisory Committee. (1976). *Women back to work: guidelines for employers on women returning to work*. Wellington: Vocational Training Council.
- Wood, F. (2000, September). South Island set to grow through local innovation. *Canterbury Digest*, p. 26.
- Wood, S. (Ed.). (1989). *The transformation of work? Skill, flexibility and the labour process* (first ed.). London: Unwin Hyman.
- World Bank. (1994). *Higher education: the lessons of experience*. Washington, D.C.: World Bank.

World Bank: Task force on higher education and society. (2000). *Higher education in developing countries: peril and promise* (20182). Washington, D.C.: World Bank.

Wylde, A. F. (2001). *A history of New Zealand technology*. Techhistory. Available: www.Techhistory.co.nz [2001, 3 March].

Wylde, F. N. (1968). *The changing curriculum*. Paper presented at the New Zealand School Boards' Association, Southern Region, Christchurch.

Yarwood, V. (1993, November). Lessons in human capital. *Management*, pp. 55-60.

Zorn, T. (1998). Changes in tertiary education in New Zealand and Australia. *Australian Journal of Communication*, 25 (2), 32- 43.

Appendices

Appendix A and Appendix B (1-4) support the thesis chapters by supplying more information about the qualitative and quantitative data on which the study is based.

Appendix A is included because this thesis has had a long genesis, which has informed not only the choice of topic but also the methodology of the preceding chapters. There are many people who are unaware of the impact they have had on this study of education for occupational change but who should be acknowledged. I have chosen to acknowledge them here rather than in the preface as their contribution is directly tied to my experience. I was a participant and an observer, in the process of helping others retrain, for many years before formally embarking on the study. Many of these experiences have informed and shaped this research.

Appendix B contains information relating to the student survey of Christchurch Polytechnic Students: information on sampling; the questionnaire; frequencies and cross-tabulations for answers to all questions presented for full-time and part-time students and by gender for significant questions.

Appendix A

The qualitative data: the participant observer at work

I have in the preceding chapters, described changes in the way in which both work, and retraining for work, have been re-conceptualised and restructured in the last half of the twentieth century. I do this through examining retraining undertaken in institutional contexts and, in particular, the role played by women in the unfolding of this story. I have aimed to shed light on the new phenomenon of education for occupational change, and on the crucial place of women as pioneers in this process, in order to ensure the visibility of retraining and of women's role.

These aims have had further relevance because they led to the methodological choices outlined in Chapter 2, which have shaped this study. This study also has some of the hallmarks of women's work. I mentioned in Chapter 2 that the origins of this study are grounded in personal experience and observation. But there is another relevant consequence. If I had elected to follow a group of retrainers for a year or two and provided an account of their personal, professional and intellectual journeys, that might have made the kind of study of retraining typical of doctoral studies.

I elected instead to do 'women's work', to do a lot of things at the same time, to look at things from as many perspectives as possible and to synthesise experience and observation into understanding. I have chosen a wide-angle, perhaps rather more soft-focused, approach and tried to see as much of the situation as possible, including the state rhetoric, the OECD reports and retraining in other contexts. Since the object of my study has been, as I have just suggested, in many respects, women's work, it seems apt to have used women's work to understand it.

The reasons for putting myself into the narrative are thus twofold. The first is that I was part of the narrative and what I have written about was informed by the part I played in events relating to the retraining of women in particular but also by my involvement in retraining more generally. Second, only by placing myself in the narrative can I justify some of the methodological features of this study. It is unusual for the field work relating to a doctoral dissertation to be thirty years long as it has in this case. Much of what I discuss, I experienced at first hand. Much of the source material for this study is from my private papers. For some of what I have to say, I have expertise resulting from the traditional modes of learning, that is through experience, discussion and oral tradition, rather than through formal institutional learning. It is a gentle irony that knowledge, much of it acquired in this way, is now being put together for an institutional qualification and I am now in a curious way attempting to gain recognition for my own prior learning.

Recognising (my) prior learning

In the 1970s I joined the Society for Research on Women (SROW) which had as its major aim to document the position of women in New Zealand so that they would become more visible as a group and as individuals. The Society was a society of volunteers, mostly well-educated women, who were using their emancipated situation and access to knowledge and capacity for critical review, that is their education, to broaden the feminist analysis of women's position through research. The Society was in fact rather like a medieval

university but with a practical interest. It was intellectually independent of the state, and scientific in seeking the truth about the state of women. It was democratic with a changing leadership and a strongly collegial mode of governance. I have, in Chapter 8, discussed the volunteer phrase in women's application of their education and skills.

I was the co-coordinator for SROW's second national study *Women and Money* (Meade & Kuiper, 1981), a survey, both quantitative and qualitative, of the access which New Zealand women had to money. *Women and Money* documented the difficulties women faced because of their financial dependence, a motivating factor for many of the women in Chapter 8.

It is also important to note at this point that the transmission of knowledge and skills in SROW was through traditional transmission methods. The women involved in SROW acquired the social science skills of interviewer, questionnaire constructor, numerical analyst, and report writer through the informal network of expertise of SROW members. Informal workshops on administering the questionnaire for *Women and Money* were held in all the main centres and volunteers learned the skills of interviewing, using interview schedules and coding. The acquisition of these skills was practically focussed and uncredentialed. SROW was a highly effective community of social science practice.

At this point I entered paid employment as a tutor at the Christchurch Polytechnic, initially on a part-time basis teaching women who wished to return to the workforce. I was, again ironically, a woman like the women I taught. At the same time I had young children and was involved in volunteer work both with the SROW and my children's kindergarten.

The next phase of both my paid and unpaid work centred on women's employment. In line with the findings of *Women and Money*, it was clear that if women were to return to paid employment, many traditional areas in which women were employed were poorly paid. Therefore it followed that women should attempt to enter non-traditional, that is male-dominated, occupations. I worked within the Polytechnic and nationally on initiatives to encourage women into technical and trade areas of employment. At the same time this gave rise to another SROW study which resulted in a set of pamphlets for careers advisers to provide to young women in schools to get them to think about entering non-traditional jobs. (*The Personal Viewpoints* pamphlets were published by the Vocational Training Council.) In a consequent study I examined how the Christchurch Polytechnic might provide avenues for women to enter non-traditional employment (Kuiper, 1986).

As the climate changed to reducing student allowances and charging increased tuition fees, I contributed to the TAG review on allowances on behalf of the Polytechnic Students Association, 1985. The research for this submission informs my discussion of these changes in Chapter 8.

My paid employment and my community involvement became increasingly connected with policy, both directly and through the networks of women with parallel commitments. My position as a woman working in the area of the employment of women led to my being appointed as a Ministerial appointee on the National Advisory Council on the Employment of Women (NACEW). From a beginning as a volunteer researcher, and then a tutor for women returning to the workforce, I had now become an adviser to the Minister of Employment and thus became involved in public policy issues where retraining was a particularly strong focus. I was on NACEW (1982-1990) during a time when some of the most important recent changes in New Zealand public policy took place, namely the years of the fourth Labour Government. NACEW read and worked with many public policy documents and, during this period, published *Beyond the Barriers: The state, the economy and women's employment 1984-1990*. Again I have many reasons to thank the women who were my colleagues on NACEW. The level-headed, practical analysis of how women's employment prospects in New Zealand might be enhanced has made a significant contribution to the analysis I present, particularly in Chapter 9.

One of the changes advocated by NACEW and other women's groups for easing women's situation in combining paid employment with the care of school age children was to permit job sharing. I was one of the first women to job share in a New Zealand educational institution. There was much public interest in this since it was a significant desideratum in allowing women to return to the paid workforce. These desiderata are discussed in Chapter 9. Another clear desideratum for women in the paid workforce was pay equity and I chaired the NACEW submission on pay equity which was a contribution of the pay equity legislation introduced by the fourth Labour government and which is mentioned in Chapter 8.

The changes in women's employment patterns and the increasing calls for job-ready graduates led to my developing, with colleagues, two post-graduate Polytechnic diplomas for women and men. This shift from providing the emancipatory education of the New Outlook course to practical, vocation skills for paid employment was a crucial stage in my

recognition of the emerging phenomenon of education for occupational change. The shift in emphasis in public policy to such vocational training is examined in Chapter 7.

The changes which took place in the workplaces of New Zealand as a result of the reforms of the fourth Labour Government and its successors came increasingly to manifest themselves through central control of course content and pedagogy by the New Zealand Qualifications Authority. As a result, I undertook a project of research into the Recognition of Prior Learning (Kuiper, 1994). This was envisaged as a way of enabling the disadvantaged to cope with a world of increasing credentialism, a hope which my research suggested was over-optimistic. The subsequent failure of RPL to thrive appears to support this finding.

I was also involved in the processes related to the introduction of NZQA both in writing and submitting proposals and on panels which approved new qualifications. The discussion of these in Chapter 10 are therefore informed by first-hand experience.

The workplace itself also became increasingly managerial; my period acting as a head of department informs my discussion of the providers in Chapter 10.

On a number of field trips I actively looked at the place of women in education and employment in countries other than New Zealand: in 1986 in the USA; in 1988 in Melbourne, Australia; and in 1995 in Utrecht, The Netherlands, and in Leicester and at the Department of Education and Employment in Sheffield, United Kingdom. My observations in Chapter 9 are based on this research.

In addition to thanking those who contributed directly to this study, I wish to acknowledge those whom I worked alongside and those with whom I shared the journey which was the genesis for this study. I am grateful to the women from various groups of 'the second wave' of the women's movement. Especially I affectionately acknowledge the friends from SROW with whom I did research and whose commitment and good sense made such an impact on the situation of women in New Zealand. I worked most closely over many years with Anne Meade and Ros Burdon. I am grateful to Jenny Heal with whom I learned to job share (there being no traditional knowledge of job sharing from which to learn) and for many years of conversations while tutoring together. The women in the Next Step Centre courses contributed immeasurably through their involvement as pioneers.

I acknowledge the leadership of Ann Hercus, when Minister for Women's Affairs, and John Hercus, my employer as Principal of the Christchurch Polytechnic, in facilitating change in

both policy and practice which affected women's lives, particularly women's employment. Others include Judi Pattison, with whom I co-authored *Working your way back to work* (Kuiper & Pattison, 1989) and, among many other colleagues at Christchurch Polytechnic, Marjorie Manthei.

More personally and privately, my family and friends have provided support and inspiration. I acknowledge my father's lifetime work and commitment to education, like that of Beeby and Renwick, as "an instrument of both social betterment and economic and social progress". My mother made continuing adjustments as I moved in new directions. My friends listened, especially Sydney Taylor, whom I remember with much love. My daughters, having been involved in my continuing education, delight me in showing commitment to feminism and to lifelong learning as they shape their own lives. I hope Gabrielle has enjoyed sharing the Ph.D. experience with her mother although across the Tasman. It cannot be often that mother and daughter complete Ph.D projects within such a short time frame.

Above all, I have shared this journey with Kon Kuiper over so many years and only he knows the extent of this debt and sharing.

Appendix B

The quantitative data

Appendix B1

The student survey of mature students at Christchurch Polytechnic, 1995/6:
administration of the questionnaire.

After the sample had been selected (see Appendix B3) names and addresses were supplied from the Polytechnic records, with the approval and assistance of the Academic Registrar. Assurances of confidentiality and that the information would be used only for the research purpose specified, had been given when access to the Student Record System was requested.

For a sample of this size where names and addresses were available, a postal questionnaire was an appropriate method. The questionnaires were posted to the 105 full-time and 195 part-time students selected with a covering letter together with a franked return envelope and a letter on Polytechnic letterhead explaining the purpose of the questionnaire, guaranteeing confidentiality. A postage-paid, addressed envelope was included and a reminder letter sent after a period of 2 weeks had elapsed without a reply being received. Seventy-five replies (a response rate of 71.4 %) were received from the full-time group and 139 replies (a response rate of 71.2%) from the part-time students.

QUESTIONNAIRE

Coding
Purposes
Only

Instructions

Please answer the following questions by ticking the appropriate box or boxes or supplying the information asked for.

Some questions ask you to choose between two possible alternatives.

In such cases please choose the answer which suits you better and tick one box, but comment if you wish.

Part A: The Course

1 Which Polytechnic course or courses are you currently enrolled in?

2 Are you a:

Full-time student 1

Part-time student 2

3 How many hours a week do you attend classes?

Fewer than 5 1

6 - 19 2

20 or more 3

4 Are you working towards a qualification?

Yes 1

No 2

5 If yes, please name it _____

Part B: Personal Information

6 What age are you?

30 - 34 years 1

35 - 39 years 2

40 - 49 years 3

50 or over 4

7 Are you:

- 8 Are you:
- | | | |
|--------------------|--------------------------|---|
| Male | <input type="checkbox"/> | 1 |
| Female | <input type="checkbox"/> | 2 |
| Single | <input type="checkbox"/> | 1 |
| Married/defacto | <input type="checkbox"/> | 2 |
| Separated/divorced | <input type="checkbox"/> | 3 |
| Widowed | <input type="checkbox"/> | 4 |
| Other? | <input type="checkbox"/> | 5 |
- (please specify) _____

- 9 How many children do you have?
- | | | |
|---------------|--------------------------|---|
| None | <input type="checkbox"/> | 1 |
| One | <input type="checkbox"/> | 2 |
| Two | <input type="checkbox"/> | 3 |
| Three or more | <input type="checkbox"/> | 4 |

Part C: Occupational History

- 10 What is your main job (paid or unpaid) or activity?
- | | | |
|---|--------------------------|---|
| Student | <input type="checkbox"/> | 1 |
| Childcare
or domestic responsibilities | <input type="checkbox"/> | 2 |
| Paid employment | <input type="checkbox"/> | 3 |
| Other | <input type="checkbox"/> | 4 |
- (please specify) _____

- 11 How many hours a week on average do you spend in paid work?
- | | | |
|-------------------------|--------------------------|---|
| None | <input type="checkbox"/> | 1 |
| 10 hours a week or less | <input type="checkbox"/> | 2 |
| 11 - 20 hours a week | <input type="checkbox"/> | 3 |
| 21 - 30 hours a week | <input type="checkbox"/> | 4 |
| Over 30 hours a week | <input type="checkbox"/> | 5 |

12 Please name the job or jobs, giving detail, e.g. *Kindergarten teacher*, not just *teacher*.

13 Thinking back over the jobs you have done in the past, what do you consider to be, or to have been, your major, paid occupation? Give one.

14 Have you had any job training since leaving school?

- | | | |
|-----|--------------------------|---|
| Yes | <input type="checkbox"/> | 1 |
| No | <input type="checkbox"/> | 2 |

15 If yes, in what occupational area?

16 What is your highest educational qualification?

- | | | |
|-----------------------------------|--------------------------|---|
| School Certificate | <input type="checkbox"/> | 1 |
| University Entrance
or Bursary | <input type="checkbox"/> | 2 |
| Certificate or Diploma | <input type="checkbox"/> | 3 |
| Degree | <input type="checkbox"/> | 4 |
| Other (please specify) | <input type="checkbox"/> | 5 |
-

Part D: Reasons for doing the course

17 Why are you taking this course? Please choose ONE of the following:

- | | | |
|---|--------------------------|---|
| Primarily to gain skills
and/or qualifications | <input type="checkbox"/> | 1 |
| or primarily for interest | <input type="checkbox"/> | 2 |

Please comment if you wish

If your main motivation is interest, please go on to question 21.

- | | | | |
|----|--|--------------------------|---|
| 18 | Do you wish to gain further skills in an area you are already working in | <input type="checkbox"/> | 1 |
| | or have worked in previously | <input type="checkbox"/> | 2 |
| | or to gain skills in a new area? | <input type="checkbox"/> | 3 |

Comments

- 19 Please name the area _____

If the area is one you are already working in please go on to question 21.

- | | | | |
|----|---|--------------------------|---|
| 20 | Do you intend to seek employment in this field? | | |
| | Yes | <input type="checkbox"/> | 1 |
| | No | <input type="checkbox"/> | 2 |

Please comment if you wish

Part E: Duration of Course

- | | | | |
|----|--|--------------------------|---|
| 21 | When did you first enrol in this course? | | |
| | 1995 | <input type="checkbox"/> | 1 |
| | 1994 | <input type="checkbox"/> | 2 |
| | 1993 | <input type="checkbox"/> | 3 |
| | Other
(please give year) | <input type="checkbox"/> | 4 |

- | | | | |
|----|--|--------------------------|---|
| 22 | When do you expect to finish your current course of study? | | |
| | 1995 | <input type="checkbox"/> | 1 |
| | 1996 | <input type="checkbox"/> | 2 |
| | 1997 | <input type="checkbox"/> | 3 |
| | Other (please comment) | <input type="checkbox"/> | 4 |

Part F: Fees

- 23 What are the fees for this course?
- | | | |
|------------------|--------------------------|---|
| \$500 or less | <input type="checkbox"/> | 1 |
| \$501 - \$1000 | <input type="checkbox"/> | 2 |
| \$1001 - \$2000 | <input type="checkbox"/> | 3 |
| More than \$2001 | <input type="checkbox"/> | 4 |
- 24 Are you paying the fees yourself?
- | | | |
|-----|--------------------------|---|
| Yes | <input type="checkbox"/> | 1 |
| No | <input type="checkbox"/> | 2 |

If not please explain, e.g. paid for by employer.

- 25 If you would like to comment on how the question of fees affects you and your decision to study please do so.

Thank you for taking the time to respond to this questionnaire. The information you have given will be useful in providing information about adults who are undertaking study.

Thank you for your help.

Appendix B3

Selecting the sample

The full-time student sample.

Those students, defined as full-time because they were enrolled in a course or courses of more than 0.9 EFTS, fitted the criteria of being full-time, full-year students over 30 years of age. Excluded from this group were those who did not fit because they were speakers of other languages studying English or students in courses for those with disabilities. Also excluded as not fitting the 'full-time full-year' category were those in shorter programmes e.g. 'the minimalists'; those in fulltime programmes which ran only for 12 or 14 weeks such as general catering or 'Gib board fixers'; or for a semester – Business Studies; or half year – Office Technology. Those students enrolled in the Japanese language degree because they enrolled by papers and so were not identified in the computerised records as being enrolled in a full-time programme, were also excluded.

Excluding students who were not New Zealand permanent residents further reduced the number of students in the fulltime target group by 34 to 225. The decision to sample the students by course, surveying all students in any course to a maximum of three, was made to ensure that the sample reflected the range of courses in which mature students were enrolled. As a result of this decision, a disproportionate stratified random sample with a maximum of three students being chosen from each course and a total sample size of 105 was produced from the group of 225 students. The relevant course occurrences with the number of students who could potentially be surveyed and the actual number chosen from each group are listed below. Where there were one, two or three students in a course all were chosen; over three and three were chosen. There were two exceptions to this attempt to ensure coverage of courses in this way. Only one student was selected from each of the Maori language course occurrences as the coding for these differed and the proportion of course occurrences to students was higher. Selecting three students from each of these courses would have been disproportionate.

Full-time sample by course

Course name	Eligible students	Number sampled
National Certificate in Business Studies	8	3
Diploma in Craft Design	6	3
Professional Photography I	2	2
Professional Photography II	1	1
Diploma in Visual Communication Design	3	3
Introductory Cert in Science and Technology	1	1
NZ Certificate in Architectural Drafting	5	3
Certificate in Interior Decor	5	3
Diploma in Interior Design	10	3
Certificate in Social Service	5	3
Advanced Certificate in Ski Area Management	3	3
Diploma in Computer Aided Design	5	3
NZCE Civil	3	3
NZCE Mechanical	2	2
Certificate in Tertiary Studies – Technology	1	1
NZC Electronics and Computers	3	3
Certificate in Baking and Patisserie	1	1
Advanced Certificate in Clothing and Design	5	3
Certificate in Chinese Language	6	3
Certificate in Japanese Language	5	3
(includes one student wrongly coded as being over 30; she was born in 1971, not 1911)		
Bachelor of Japanese Language	2	2
Bachelor of Broadcasting Communication	3	3
Diploma in Jazz Studies	8	3
Tuara/Tiana	8	1
Kaupapa Whiranga Korero	3	1
Te Mana Me Te Wehi	3	1
Whakapiri i te Reo	2	1
Diploma in Nursing Studies I	26	3
Bachelor of Nursing I	7	3
Diploma in Nursing Studies II	29	3
Bachelor of Nursing II	4	3
Diploma in Midwifery	7	3
Administrative Assistant	2	2
Office Technology and Tourism	5	3
Business Systems for Pacific Island and Maori	2	2
CP Tertiary Studies - Multi Disciplinary	2	2
Certificate in Business Computing	5	3
Advanced Certificate in Business Computing	3	3
National Diploma in Business Computing	2	2
NZC Science Stages 1-3 Unspecified	2	2
Certificate in Tertiary Studies (Science)	4	3
National Diploma in Medical Diagnostic Image	2	2
Certificate in Organic Growing	5	3
Certificate in Viticulture, Wine, Food	2	2
Certificate Horticultural Practice	2	2
Teaching People with Disabilities	3	3

The part-time student sample

The part-time sample of students of 30 years of age excluded non-citizen permanent residents and 'hobby classes' (defined as those courses which were non-assessed and obviously non-vocational). In order to obtain a sample of comparable size with the full-time group, the decision was taken to include all those students in these courses who had their birthdays in the first seven days in the month, resulting in a sample size of 195 students. (In this sample, as in the total part-time student group, the gender mix was slightly more biased towards women with a ratio of male 28%: female 71%).

Gender

Gender was not a variable taken into account in selecting the sample except that there was an awareness that sampling a maximum of three students in any full-time course could, because of the large numbers enrolled in nursing programmes, affect the proportions of women represented by under-representing them. However the random sampling produced proportions (male 44%: female 56%) in this group comparable with the ratios in the full-time student body (male 40%: female 60%) and with proportions of the 538 students who were full-time for part or all the year (male 40.15%: 59.8% female).

Appendix B4

Tables of quantitative results

Cross-tabulations of full-time and part-time students

Part A: The Course

Question

2 What kind of student are you?

Full-time	%	Part-time	%	Total	%
75	35.0	139	65.0	214	100

3 How many hours a week do you attend classes?

	Full-time	%	Part-time	%	Total	%
Fewer than 5	0	0	102	73.4	102	47.7
6 - 19	14	18.7	28	20.1	42	19.6
20 or more	61	81.3	7	5.0	68	31.8
No/invalid response	0	0	2	1.4	2	0.9

4 Are you working towards a qualification?

	Full-time	%	Part-time	%	Total	%
Yes	74	98.7	115	82.7	198	88.3
No	0	0	22	15.8	22	10.3
No/invalid response	1	1.3	2	1.4	3	1.4

Part B: Personal Information

Question

6 What age are you?

	Full-time	%	Part-time	%	Total	%
30 - 34 years	40	53.3	48	34.5	88	41.1
35 - 39 years	17	22.7	37	36.6	54	25.2
40 - 49 years	17	22.7	43	30.9	60	28.0
50 or over	1	1.3	11	7.9	12	5.6

7 Are you:

	Full-time	%	Part-time	%	Total	%
Male	33	44.0	39	28.1	72	33.6
Female	42	56.0	100	71.9	142	66.4

8 Are you:

	Full-time	%	Part-time	%	Total	%
Single	26	34.7	18	12.9	44	20.6
Married/de facto	34	45.3	93	66.9	127	59.3
Separated/divorced	14	18.7	22	15.8	36	16.8
Widowed	0	0	3	2.2	3	1.4
Other	1	1.3	1	0.7	2	0.9
No/invalid response	0	0	2	1.4	2	0.9

9 How many children do you have?

	Full-time	%	Part-time	%	Total	%
None	32	42.7	39	28.1	71	33.2
One	12	16	17	12.2	29	13.6
Two	18	24	51	36.7	69	32.2
Three or more	13	17.3	32	23.0	45	21.0

Part C: Occupational History

10 What is your main job (paid or unpaid) or activity?

	Full-time	%	Part-time	%	Total	%
Student	59	78.7	4	2.9	63	29.4
Childcare or domestic responsibilities	7	9.3	14	10.1	21	9.8
Paid employment	1	1.3	108	77.7	109	50.9
Other	8	10.7	5	3.6	13	6.1
2 of above	0	0	8	5.7	8	3.7

11 How many hours a week on average do you spend in paid work?

	Full-time	%	Part-time	%	Total	%
None	46	61.3	11	7.9	57	26.6
10 hrs/week or fewer	23	30.7	12	8.6	35	16.4
11 - 20hrs/week	5	6.7	12	8.6	17	7.9
21 – 30 hrs/week	0	0	11	7.9	11	5.1
Over 30hrs/week	1	1.3	91	65.5	93	43.5
No/invalid response	0	0	2	1.4	2	.9

Question

14 Have you had any job training since leaving school?

	Full-time	%	Part-time	%	Total	%
Yes	57	76.0	120	86.3	177	82.7
No	17	22.7	19	13.7	36	16.8

16 What is your highest educational qualification?

	Full-time	%	Part-time	%	Total	%
School certificate	17	22.7	34	24.5	51	23.8
UE or Bursary	11	14.7	22	15.8	33	15.5
Certificate or Diploma	21	28.0	31	22.3	52	24.4
Degree	7	9.3	14	10.1	21	9.8
Other	17	22.7	25	18.0	42	19.6
No/invalid response	2	2.6	12	9.4	14	6.5

Part D: Reasons for doing the course

17 Why are you taking this course? Please choose ONE of the following:

	Full-time	%	Part-time	%	Total	%
Primarily to gain skills and/or qualifications	70	93.3	122	87.8	192	89.7
Primarily for interest	3	4.0	11	7.9	14	6.5
Both	2	100	0	0	2	0.9

Question

18 Do you wish to gain further skills?

	Full-time	%	Part-time	%	Total	%
in an area you are already working in	13	17.3	62	44.6	75	35
or have worked in previously	10	13.3	9	6.5	19	8.9
or to gain skills in a new area	43	57.3	33	23.7	76	35.5
Ticked 2 boxes	4	5.3	31	22.3	35	16.4
No/invalid response	5	6.7	4	2.9	9	4.2

20 Do you intend to seek employment in this field?

	Full-time	%	Part-time	%	Total	%
Yes	64	85.3	53	38.1	117	54.6
No	2	2.7	12	8.6	14	6.5
Undecided	1	1.3	1	1.7	2	0.9
No/invalid response	8	10.6	73	52.6	81	37.8

Note: This question was not relevant for those already employed in the area in which they were studying.

Part E: Duration of Course

21 When did you first enrol in this course?

	Full-time	%	Part-time	%	Total	%
1995	42	56.0	33	23.7	75	35.0
1994	30	40.0	17	12.2	47	22.0
1993	1	1.3	7	5.0	8	3.7
Other	2	2.7	76	54.7	78	36.4
No/invalid response	0	0	6	4.3	6	2.8

22 When do you expect to finish your current course of study?

	Full-time	%	Part-time	%	Total	%
1995	40	53.3	2	1.4	42	19.6
1996	21	28.0	61	43.9	82	38.3
1997	12	16.0	23	16.5	35	16.4
Other	2	2.7	49	35.3	51	23.8
No/invalid response	0	0	4	2.9	4	1.8

Part F: Fees

23 What are the fees for this course?

	Full-time	%	Part-time	%	Total	%
\$500 or less	1	1.3	79	56.8	80	37.4
\$501 - \$1000	2	2.7	19	13.7	21	9.8
\$1001 - \$2000	10	13.3	17	12.2	27	12.6
More than \$2001	62	82.7	20	14.4	82	38.3
No/invalid response	0	0	4	2.8	4	1.8

24 Are you paying the fees yourself?

	Full-time	%	Part-time	%	Total	%
Yes	50	66.7	90	64.7	140	65.4
No	23	30.7	44	31.7	67	31.3
Combination	2	2.7	2	1.4	4	1.8
No/invalid response	0	0	3	2.2	3	1.4

Cross tabulations related to gender

Age against gender: Q6 by Q7

	Male	%	Female	%	Total	%
30 - 34 years	36	40.9	52	59.1	88	41.1
35 - 39 years	19	35.2	35	64.8	54	25.2
40 - 49 years	17	28.3	43	71.7	60	28.0
50 or over	0	0	12	8.5	12	5.6

Number of children against gender: Q9 by Q7

	Male	%	Female	%	Total	%
None	29	40.9	42	59.2	71	33.2
One	10	34.5	19	65.5	29	13.6
Two	24	34.8	45	65.2	69	32.2
Three or more	9	20.0	36	80.0	45	21.0

Hours of paid work by gender: Q11 by Q7

	Male	%	Female	%	Total	%
None	22	38.6	35	61.4	57	26.6
10 hrs/week or fewer	9	25.7	26	74.3	35	16.4
11 - 20hrs/week	2	11.8	15	88.2	17	7.9
21 – 30 hrs/week	0	0	11	100	11	5.1
Over 30hrs/week	38	40.9	55	59.1	93	43.5
No/invalid response	1	100			2	.9

Job training since school against gender: Q14 by Q7

	Male	%	Female	%	Total	%
Yes	64	36.2	113	63.8	177	82.7
No	8	22.2	28	77.8	36	16.8

Highest qualification against gender: Q16 by Q7

	Male	%	Female	%	Total	%
School certificate	18	35.3	33	64.7	51	23.8
UE or Bursary	14	42.4	19	57.6	33	15.5
Certificate or Diploma	18	34.6	34	65.4	52	24.4
Degree	5	23.8	16	76.2	21	9.9
Other	13	31.0	29	69.0	42	19.7
No/invalid response	4	28.6	10	71.4	14	6.5

Reasons for doing the course(s) by gender: Q17 by Q7

	Male	%	Female	%	Total	%
Primarily to gain skills and/or qualifications	57	29.7	135	70.3	192	89.7
Primarily for interest	9	64.3	5	35.7	14	6.5
Both	2	100	0	0	2	.9
Invalid	4	66.7	2	33.3	6	2.8

Area of skills against gender: Q18 by Q7

	Male	%	Female	%	Total	%
in an area you are already working in	26	34.7	49	65.3	75	35
or have worked in previously	8	42.1	11	57.9	19	8.9
or to gain skills in a new area	22	28.9	54	71.1	76	35.5
Ticked 2 boxes	10	28.6	25	71.4	35	16.4
No/invalid response	6	66.6	3	33.3	9	4.2

Employment area sought by gender: Q20 by Q7

	Male	%	Female	%	Total	%
Yes	37	31.6	80	68.4	117	54.6
No	5	35.7	9	64.3	14	6.5
Undecided	0	0	2	100	2	0.9
No/invalid response	29	36.2	51	64.7	80	37.8

Who pays the fees by gender: Q24 by Q7

	Male	%	Female	%	Total	%
Self	54	38.6	86	61.4	140	65.4
Other	16	23.9	51	76.1	67	31.3
Combination	1	25.0	3	75.0	4	1.8
No/invalid response	1	33.3	2	66.6	3	1.4