

Organising Lifelong Learning

A Report on University Strategies and Business Models
for Lifelong Learning in Higher Education

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USBM

university strategies
and business models
for lifelong learning



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INTRODUCTION

The aim of this report on “Organising Lifelong Learning” is to frame the central questions that should be taken into account and considered when implementing a university strategy and business model for lifelong learning at a university. The hope is to boost the organisation of lifelong learning in universities by paving the way for actual changes in institutional strategies. The goal is to involve and stimulate stakeholders (universities, governments, social partners, businesses) in operating lifelong learning and to present them with possibilities and opportunities for organising this.

The report is based on experiences of implementing lifelong learning in universities collected in the project: University Strategies and Business Models for Lifelong Learning in Higher Education (USBM). Since October 2008 a study among 12 members within EADTU: European Association of Distance Teaching Universities has been conducted in order to identify best practice in dealing with lifelong learning in Higher Education. The partners in the USBM project are dedicated open universities and mixed mode universities – both type of institutions with a long tradition for offering lifelong learning.

The results are based on a synthesis of the findings from questionnaires that have been analysed and presented in the booklet “Showcases of University Strategies and Business Models for Lifelong Learning” (EADTU 2010) by Luis Tinoca and Martin Watkinson.

Luis Tinoca’s article “The scenario for lifelong learning” identifies opportunities and obstacles for improving and increasing lifelong learning. His focus is on sector and target groups for lifelong learning, and the success factors related to content, pedagogical delivery and organisational issues; illustrated by examples of good practice from the partners.

Martin Watkinson’s article “Business models for lifelong learning” presents breakthrough experiments from partner institutions selected as examples of best practice. The analysis is organised with regard to learning objectives and outcomes (formal, non-formal or informal learning), business model considerations and lifelong learning strategies used by these organisations.

Based on the institutional thinking and examples of best practice presented in the showcase-booklet this report on “Organising Lifelong Learning” tries to outline the basic elements that should be incorporated into the strategic considerations universities have to make when moving into the area of lifelong learning.

In order to understand the increased focus by governments and by the commission to implement lifelong learning at university level, a brief overview of European lifelong learning policies and the present situation at universities is included in the beginning of the report (chapter 1).

While this report has a focus on university policy issues and aims at the management level, more practical guidelines on how to implement lifelong learning strategies and business models at university level are presented in an interactive web-site in which the strategic questions are interwoven with examples of best practice from the partner universities – see booklet “Showcases of University Strategies and Business Models for Lifelong Learning”.



1. LIFELONG LEARNING IN UNIVERSITIES

The focus in this report on “Organising Lifelong Learning” is on issues to consider when universities want to develop strategies and business models for lifelong learning. To place these considerations in a proper framework I will use this first chapter to give a short overview of the European policy framework for lifelong learning and the current situation for lifelong learning in European universities and higher education institutions. In the end of the chapter I will present how lifelong learning is conceptualised in the USBM project and in this report.

1.1 European policy framework for lifelong learning

In 1996 lifelong learning was firmly put on the European agenda when the year was announced as the European Year of Lifelong Learning. The year after a World Conference on Lifelong Learning was organised and in 1998 the Council of Europe launched the project: “Lifelong Learning for Equity and Social Cohesion: a New Challenge to Higher Education” (EECS-HE 98/5 rev.2. Strasbourg 1998). In general, the EU lifelong learning strategy is concerned with the whole range of learning “from the cradle to the grave” and covers all forms of education (formal, informal or non-formal). It thus encompasses all areas of learning including workplace learning, as well as the skills, knowledge, attitudes and behaviours that people acquire in day-to-day experiences. Furthermore, it is concerned both with personal fulfilment and enterprise; employability and adaptability; active citizenship and social inclusion.

This was emphasised in the European Commission, when it defined lifelong learning as “all learning activity undertaken throughout life, with the aim of improving knowledge, skills and competence, within a personal, civic, social and/or employment-related perspective.” (Making a European Area of Lifelong Learning a Reality”, November 2001, p.10). And it was further developed in a hand-out on

“Lifelong learning – a socio-economic interpretation” from 2003.

Lifelong learning is defined as “all learning activity undertaken throughout life, with the aim of improving knowledge, skills and competence, within a personal, civic, social and/or employment-related perspective.”

Lifelong learning is therefore about:

- acquiring and updating all kinds of abilities, interests, knowledge and qualifications from the pre-school years to post-retirement. It promotes the development of knowledge and competences that will enable each citizen to adapt to the knowledge-based society and actively participate in all spheres of social and economic life, taking more control of his or her future.
- valuing all forms of learning, including: formal learning, such as a degree course followed at university; non-formal learning, such as vocational skills acquired at the workplace; and informal learning, such as inter-generational learning, for example where parents learn to use ICT through their children, or learning how to play an instrument together with friends.



Learning opportunities should be available to all citizens on an ongoing basis. In practice this should mean that citizens each have individual learning pathways, suitable to their needs and interests at all stages of their lives. The content of learning, the way learning is accessed, and where it takes place may vary depending on the learner and their learning requirements.

Lifelong learning is also about providing “second chances” to update basic skills and also offering learning opportunities at more advanced levels. All this means that formal systems of provision need to become much more open and flexible, so that such opportunities can truly be tailored to the needs of the learner, or indeed the potential learner.

[http://www.warwickshire.gov.uk/Web/Corporate/pages.nsf/Links/B9A87C2C4F2A52A2802571A9004AC861/\\$file/03+Lifelong+learning.pdf](http://www.warwickshire.gov.uk/Web/Corporate/pages.nsf/Links/B9A87C2C4F2A52A2802571A9004AC861/$file/03+Lifelong+learning.pdf)

The same socio-economic approach to introducing lifelong learning has dominated the decision by the European Parliament from November 24, 2006, but with an additional focus on interchange, cooperation and mobility between education and training systems within the Community. Furthermore collaboration on quality assurance is added to the agenda.

The Lifelong Learning Programme

Article 1

Establishment of the Lifelong Learning Programme

1. This Decision establishes a programme for Community action in the field of lifelong learning, hereinafter referred to as ‘the Lifelong Learning Programme’.
2. The general objective of the Lifelong Learning Programme is to contribute through lifelong learning to the development of the Community as an advanced knowledge-based society, with sustainable economic development, more and better jobs and greater social cohesion, while ensuring good protection of the environment for future generations. In particular, it aims to foster interchange, cooperation and mobility between education and training systems within the Community so that they become a world quality reference.
3. The Lifelong Learning Programme shall have the following specific objectives:
 - (a) to contribute to the development of quality lifelong learning, and to promote high performance, innovation and a European dimension in systems and practices in the field;
 - (b) to support the realisation of a European area for lifelong learning;
 - (c) to help improve the quality, attractiveness and accessibility of the opportunities for lifelong learning available within Member States;
 - (d) to reinforce the contribution of lifelong learning to social cohesion, active citizenship, intercultural dialogue, gender equality and personal fulfilment;



- (e) to help promote creativity, competitiveness, employability and the growth of an entrepreneurial spirit
- (f) to contribute to increased participation in lifelong learning by people of all ages, including those with special needs and disadvantaged groups, regardless of their socio-economic background;
- (g) to promote language learning and linguistic diversity;
- (h) to support the development of innovative ICT-based content, services, pedagogies and practice for lifelong learning;
- (i) to reinforce the role of lifelong learning in creating a sense of European citizenship based on understanding and respect for human rights and democracy, and encouraging tolerance and respect for other peoples and cultures;
- (j) to promote cooperation in quality assurance in all sectors of education and training in Europe;
- (k) to encourage the best use of results, innovative products and processes and to exchange good practice in the fields covered by the Lifelong Learning Programme, in order to improve the quality of education and training.

http://eur-lex.europa.eu/smartapi/cgi/sga_doc?smartapi!celexplus!prod!DocNumber&lg=en&type_doc=Decision&an_doc=2006&nu_doc=1720

Although lifelong learning has been on the European agenda for 15 years and was written in to the Lisbon Strategy from 2000 as an integrated element of the ambition to turn Europe into the leading knowledge-based economy in the world, it is now clear, in 2010, that this goal hasn't been achieved. From the latest report of the Commission "Europe 2020. A European strategy for smart, sustainable and inclusive growth" it becomes clear that the process must continue in the next ten years – that applies also to a lifelong learning strategy.

The higher educational level in Europe is still lacking behind the US and Japan and the need for upgrading unskilled labour with higher qualifications is still urgent.

A quarter of all pupils have poor reading competences, one in seven young people leave education and training too early. Around 50% reach medium qualifications level but this often fails to match labour market needs. Less than one person in three aged 25-34 has a university degree compared to 40% in the US and over 50% in Japan. According to the Shanghai index, only two European universities are in the world's top 20." (p. 20)

By 2020, 16 million more jobs will require high qualifications, while the demand for low skills will drop by 12 million jobs. Achieving longer working lives will also require the possibility to acquire and develop new skills throughout the lifetime." (p. 16)

<http://ec.europa.eu/eu2020/pdf/COMPLET EN BARROSO 007 - Europe 2020 - EN version.pdf>



The above quotations from policy papers, strategies and decisions clearly show how deeply the focus on lifelong learning is interwoven with the socio-economic plans for developing the European labour market. Lifelong learning is viewed as a proper response to the present decline of manual skilled and unskilled jobs and the parallel increase of knowledge based jobs in the service sector. As manual labour is outsourced to the third world the need for upgrading the knowledge level of the European labour force becomes more and more urgent.

In the following paragraph I will look further at how the universities and higher education institutions in Europe have responded to the lifelong learning challenge.

1.2 University responses to lifelong learning

During the last ten years, lifelong learning has become more prominent on the agenda of higher education. Open and flexible learning and continuing education have come from the periphery to the centre for many universities and higher education institutions.

In 2001 the Ministers in charge of higher education emphasised at a meeting in Prague that

“Lifelong Learning is an essential element of the European Higher Education Area. In the future Europe, built upon a knowledge-based society and economy, Lifelong Learning strategies are necessary to face the challenges of competitiveness and the use of new technologies and to improve social cohesion, equal opportunities and the quality of life.”

http://www.ond.vlaanderen.be/hogeronderwijs/bologna/documents/MDC/PRAGUE_COMMUNIQUE.pdf

The members of the European Association of Distance Teaching Universities (EADTU) were among the first universities in Europe to explicitly react to this challenge. They were already involved in open and distance learning as dedicated open universities or as mixed-mode (sometimes also called: dual-mode) universities. In 2003 EADTU added an e-learning dimension to the Bologna Process called eBologna and in 2004 the members renamed themselves as LOF-universities – Lifelong Open and Flexible Universities - at a conference in Heerlen, The Netherlands. The focus was on flexibilisation and personalisation of education for the age group 25+ in order to widen participation in higher education, catching former drop-outs and providing lifelong learning opportunities for all.

The Heerlen Message is a result of the 2004 EADTU Conference. EADTU wants to use this message to inform policy makers and all those involved in creating a European Learning Space.

- 1 The Lisbon agenda urgently requires the launch of an unorthodox EU action plan, as well as national action plans, for developing a mature knowledge-based society through a significant jump in the participation in higher education throughout Europe.
- 2 The flexibilization of learning tracks goes beyond the Bologna two cycle bachelor - master structure in terms of access(ibility), diversification and personalization.
- 3 The mobility case in 'Bologna' needs much more focus on virtual mobility besides physical mobility, which should be reflected in the EU subsidy and grant programmes.



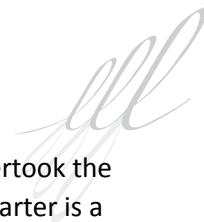
- 4 The European Learning Space should be spanned through collaborations and alliances among European universities.
- 5 Adequate implementation of lifelong learning in higher education depends on a major joint effort of three stakeholders: universities, the corporate sector and the government, which requires new arrangements of collaboration.
- 6 In order to meet the significantly increasing demand for Lifelong Open and Flexible (LOF) learning the EADTU members should seek effectiveness and efficiency by joining forces over their areas of operation and by stimulating and co-founding new LOF learning initiatives among the EU member states, especially in the new EU countries.
- 7 A strong impetus is required for R&D in the area of Lifelong Open and Flexible (LOF) learning, supported by dedicated EU and national subsidy programmes as well as by industrial initiatives.
- 8 In line with the ambition of 'Europe' to play a leading role, worldwide, in sustainable development, the EU and its member states as well as the European educational institutions and associations are urged to take on a leading role in the development of all learning, including lifelong learning, for sustainable development. The decade of Education for Sustainable Development provides an excellent opportunity to show this leading role.

<http://www.eadtu.nl/conference-2004/files/Heerlen%20MessageDEF.pdf>

In 2007 the Commission called for national reports on strategies for lifelong learning from the member states in order to enforce the implementation process at national levels. This was a follow-up on the recommendations for lifelong learning from the European Parliament (see above). Furthermore, in the same year the European University Association (EUA) responded to the lifelong learning challenge in the document: "Lisbon Declaration. Europe's Universities beyond 2010". Here EUA focuses on the need for an overarching qualification framework in order to avoid two parallel qualification systems within higher education in Europe – one for universities and one for other higher education institutions.

Universities understand the urgent need to make lifelong learning a reality in the years to come, both with regard to continuing education and training for well-qualified graduates and to initial education for disadvantaged groups. Experience shows that engaging in lifelong learning provides particular opportunities for strengthening local partnerships, diversifying funding and responding to the challenges of regional development. The Bologna tools, in particular the overarching Qualifications Framework for the European Higher Education Area adopted by Ministers in Bergen, provide opportunities to offer more diversified programmes as well as facilitating the development of systems to enable the recognition of prior informal and work-based learning. EUA urges the European Commission in its proposals for a Qualifications Framework for Lifelong Learning to avoid the development of two parallel qualifications frameworks that relate to higher education as to do so will cause problems in implementation at national level and confusion among actors on the ground. EUA also calls upon the European Commission actively to involve universities in policy development on lifelong learning. This is an issue of major concern both to the higher education and the vocational training sector and thus requires initiatives that are compatible and coherent. (p.3)

<HTTP://WWW.EUA.BE/PUBLICATIONS/#C398>



In 2008, after a seminar on lifelong learning at the Sorbonne in December 2007, EUA undertook the task to formulate the “European Universities’ Charter on Lifelong Learning” (2008). The charter is a clear policy document, which, on the one hand, encourages the European universities to incorporate lifelong learning into their educational offers in order to comply with the EU Lisbon Strategy, while, on the other hand, the national governments are called upon to support the operation and make it a success. The charter operates with a very broad understand of lifelong learning initiatives in order to incorporate as many traditional universities as possible in the move towards lifelong learning. Undoubtedly, the charter has brought lifelong learning on the agenda for traditional universities.

The European stage is set for lifelong learning, and the decade of reforms that has taken place to develop the European higher education and research areas now needs to be consolidated and taken forward to address lifelong learning challenges, taking account of existing achievements and good practice in Europe’s universities to meet diversified learner needs. Currently the terminology of lifelong learning embraces many concepts – including initial education for disadvantaged groups, continuing education and training for well-qualified graduates, and post-retirement opportunities for cultural enrichment – and is subject to considerable local, regional and national interpretation” (p.3)

<http://www.eua.be/publications/#c398>

In the Communiqué of the Bologna Ministerial Meeting in 2009 in Leuven and Louvain-la-Neuve the European ministers responsible for higher education confirmed the essential role of lifelong learning in European higher education for the years to come. In “The Bologna Process 2020 – The European Higher Education Area in the new decade” the ministers agreed upon central issues such as widening participation, partnerships between public authorities, higher education institutions, students, employers and employees and coordination of national qualifications frameworks.

10. Widening participation shall also be achieved through Lifelong learning as an integral part of our education systems. Lifelong learning is subject to the principle of public responsibility. The accessibility, quality of provision and transparency of information shall be assured. Lifelong learning involves obtaining qualifications, extending knowledge and understanding, gaining new skills and competences or enriching personal growth. Lifelong learning implies that qualifications may be obtained through flexible learning paths, including part-time studies, as well as work-based routes.
11. The implementation of lifelong learning policies requires strong partnerships between public authorities, higher education institutions, students, employers and employees. The European Universities’ Charter on Lifelong Learning developed by the European University Association provides a useful input for defining such partnerships. Successful policies for lifelong learning will include basic principles and procedures for recognition of prior learning on the basis of learning outcomes regardless of whether the knowledge, skills and competences were acquired through formal, non-formal, or informal learning paths. Lifelong learning will be supported by adequate organisational structures and funding. Lifelong learning encouraged by national policies should inform the practice of higher education institutions.
12. The development of national qualifications frameworks is an important step towards the implementation of lifelong learning. We aim at having them implemented and prepared for self-certification against the overarching Qualifications Framework for the European Higher Education Area by 2012.



This will require continued coordination at the level of the EHEA and with the European Qualifications Framework for Lifelong Learning. Within national contexts, intermediate qualifications within the first cycle can be a means of widening access to higher education.” (p.3)

<http://www.ond.vlaanderen.be/hogeronderwijs/Bologna/>

At the same time as EUA plays a major role in encouraging traditional universities to take up lifelong learning as a part of their provision, the association is also monitoring the process via a series of Trend Reports since 1999 and other publications. The focus has especially been on the implementation of the Bologna Process but as the theme of lifelong learning has become increasingly important; also this implementation has been covered.

The latest trend report from March 2010 – “Trends 2010. A Decade of Change in European Higher Education” - clearly indicates that although the EU policy framework for lifelong learning seems to be in place, there is still a long way to go for most traditional universities in Europe. In general, universities are bound to their conventional business models focusing on research and innovation and educational programming in the BA/MA structure, which is a relevant strategy to serve the target group of traditional students between the ages of 18 and 25.

“Trends 2010” analyses the slow development within lifelong learning at university level and points towards the close relation between institutional and national policies and the implementation of lifelong learning. In countries with national policies for lifelong learning universities are more likely for be active in offering lifelong learning courses and programmes. Nevertheless, in most European countries lifelong learning activities are seen as additional activities outside the core business of universities. Lifelong learning is seldom viewed as an overarching term for all educational provision

Lifelong learning has a great diversity of meanings and can be understood in many different ways as reflected in the national rectors’ conferences’ responses to Trends 2010. Depending on the institution or the country, it is conceived either as (i) a strategy and a cultural attitude to learning or (ii) a set of different activities unrelated to an overarching concept. Thus, there are generally two different ways in Europe to interpret the concept of lifelong learning:

- The first one views all provision of education in a lifelong perspective and thus includes all formal, informal and non-formal learning (Austria, Hungary, Scotland, Slovakia and Sweden subscribe to this concept).
- The second and most prevailing view regards lifelong learning as ensuring provision of a series of activities: e.g., professional upgrading, continuing education, distance education, university courses for junior, mature and senior learners, preparatory courses, and part-time education to a greater variety of learners.

The Trends 2010 survey results indicate that the development of institutional lifelong learning strategies that support all educational provision in a lifelong perspective (i.e. the first meaning of the term) evolves



very slowly. In Trends III (2003), 35% of institutions stated that they had developed an overall lifelong learning strategy. Six years later, there is a negligible increase to 39%.

(...)

The results indicate that the interpretation and implementation of the different strands of the Bologna Process vary according to national cultural contexts and understanding of lifelong learning as an overarching concept or as a set of activities, and that this diversity is reflected in how lifelong learning is embedded into institutional strategies. (p. 66-67)

<http://www.eua.be/publications/#c398>

Furthermore the “Trends 2010” report specifies some characteristics of institutions that have a strategy for lifelong learning. Larger universities are more likely to have an overarching lifelong learning strategy and an international profile compared to smaller universities that are more likely to view themselves as having a national or regional mission.

The Trends 2010 data made it possible to further identify two types of institutions that are more likely to have an overarching lifelong learning strategy.

The first is more likely to be a university, with 15 000 to 30 000 students, and an international profile. 50% of the universities with this profile have indicated that they have a lifelong learning strategy as opposed to the 39% average for the overall sample. The data indicate that this group is also more likely to have a strong research profile.

The second type includes higher education institutions that provide lifelong learning activities, but do not necessarily have an overall strategy in place. They are smaller and more likely to define themselves as having a regional (39%) or national (40%) mission. (p. 68-9)

<http://www.eua.be/publications/#c398>

General average

In the present USBM study similar conclusions are reached. The project has made a thorough analysis of the national policy frameworks for lifelong learning and of university policy strategies for lifelong learning. Despite the fact that all partners within EADTU offer dedicated programmes for lifelong learning learners, neither all nations nor all universities have a clearly formulated lifelong learning policy (see: “Showcases of University Strategies and Business Models for Lifelong Learning” p. 7).



1.3 Defining lifelong learning at university level

When we look at the concept of lifelong learning as it has evolved over the last decade (documented by the above quotations) differences in focus between the socio-economic approach and the higher education approach become obvious. From a socio-economic point of view lifelong learning serves the function of upgrading the manual unskilled labour for more knowledge intensive jobs for the benefit of themselves as well as for society as a whole. To a large extent this involves education at secondary level – pre-BA level – delivered by other institutions than universities.

From a higher education point of view the obligation to become involved in lifelong learning is basically the same, but it is reformulated as a need for widening access to university education. Some open universities are able to respond directly to these needs by recruiting students directly into their programmes due to their policy of openness – e.g. some dedicated open universities like Open University, UK and Open Universiteit, The Netherlands. Most recently, we can point to the development of Open Educational Resources, which is an initiative aiming in the same direction.

For most universities openness is not an option due to national regulations requiring the same entrance qualification to university education for all students – independently of age, gender and work experience. This is the case for mixed-mode universities, but also for some distance teaching universities such as Fernuniversität, Germany.

At the same time it is interesting to note that the latest report from the Commission “Europe 2020. A European strategy for smart, sustainable and inclusive growth” claims, “lifelong learning benefits mostly the more educated” (p.16). Undoubtedly, this is a major problem for society, but the solution is hardly to cut back on lifelong learning offered by universities. The upgrading of unskilled labour and widening access to higher education should supplement each other. Both processes are needed in order to turn Europe into a knowledge society.

The USBM project analyses experiences and cases of best practice of delivering lifelong learning at university level by open universities and mixed-mode universities. The main target group for these institutions is the age group 25+ attached to the labour market and often with an initial education (see “Showcases of University Strategies and Business Models for Lifelong Learning” p. 10). Consequently the considerations in this report - “Organising Lifelong Learning” - on implementing university strategies and business models have a similar focus and should be read with this limitation in mind.



2. DEVELOPING UNIVERSITY STRATEGIES AND BUSINESS MODELS FOR LIFELONG LEARNING

The USBM project has chosen to use the terminology university strategies and business models for lifelong learning. Other articles and books on the development of strategies - and especially when dealing with university strategies - prefer to use the term 'strategic planning' instead of business model (e.g. McNamara, PlanWare and Reichert, 2006,2). To some institutions – especially for non-profit public ones like many universities – a business model seems to be too closely related to generating income or profit to be an accepted term for their operations.

McNamara in "Strategic Planning (in non-profit and for-profit organizations)" tries to draw a less ideological separation between the terms 'strategic planning' and 'business model'.

Simply put, strategic planning determines where an organization is going over the next year or more, how it's going to get there and how it'll know if it got there or not. The focus of a strategic plan is usually on the entire organization, while the focus of a business plan is usually on a particular product, service or program. (p.1)

http://www.managementhelp.org/plan_dec/str_plan/str_plan.htm#anchor1215269

Based on this definition it makes sense to characterise implementation of lifelong learning into a university strategy as a business model. After all lifelong learning is only a part of the overall strategy for a university.

In the above-mentioned articles and web-sites as well as in most literature dealing with strategic issues a strategy comes before strategic planning and a business model. Nevertheless, as discussed further in the next paragraph, the borderlines between the phases are not well defined and may shift from author to author.

In the USBM project we have focused on the process in two steps. First, we identified the university strategies of the partner universities based on the official documents from the universities. This is very similar to the studies performed by the EUA in "Trends 2010. A Decade of Change in European Higher Education". Second, we asked the partners to name examples of courses or programmes which they themselves considered to be 'best practice'. At the same time, partners were asked to indicate the educational rationale behind the nomination and outline the financial model used. The results from this exercise were analysed and are presented in the booklet "Showcases of University Strategies and Business Models for Lifelong Learning".

Based on patterns within the collected information from partners and supplemented with literature studies on strategies and business models, the ambition of this report is to give an overview of the more principle issues to discuss, when a university considers to offer lifelong learning, and when it decides to organise the implementation.

Parallel to these overall considerations, an interactive web-site has been developed in which experiences from offering lifelong learning and the examples of best practice from the booklet "Showcases of University Strategies and Business Models for Lifelong Learning" are interwoven with the



principles for setting up strategies and business models. The web-site contains more elaborated guidelines on how to implement lifelong learning at higher education level.

2.1 Elements of a university strategy

When we look at the university strategies of the USBM partners, on the above-mentioned article and other considerations on strategic thinking a strategy normally contains the following three elements:

- a *vision* statement indicating where the company/institution expects to be in the future and how the operation in planning will contribute.
- a *mission* statement that explains what the company/institution wants to achieve by its operations in general and more specific why and when new operations are started.
- considerations on *values* – the standards governing the relationships of the organisation/institution with society, customers/students, suppliers, employees, local community and other stakeholders.

In practice when we investigate the university strategies of the USBM partners (see “Showcases of University Strategies and Business Models for Lifelong Learning” p. 7-9) and some of the many university strategies available on the homepages of European universities it becomes clear that *vision*, *mission* and *values* very often are presented in a joint introduction to the strategy – often under the heading *mission* of the university. Maybe this reflects the fact that most European universities are public institutions with a commitment to serving society, and not ordinary businesses with a goal to generate money.

The next step in formulating a university strategy is to set up a strategic plan – sometimes as part of a business plan – for who will do what and by when. Often the strategic plan (and/or the business plan) is based on a strategic analysis of the strengths, weaknesses, opportunities and threats (a SWOT analysis) the university is facing. The results are formulated as

- a statement of *objectives* to be reached – both internally and externally in relation to stakeholders, users/customers/students and society in general.
- a series of *strategic* decisions by which the mission and objectives may be achieved.
- a list of *goals* – time-based measurements to be achieved when implementing the strategic decisions in order to obtain the objectives.

Within higher education *objectives*, *strategic decisions* and goals are often closely related and integrated in the strategic statements from European Universities. As part of the strategic planning of the university they bridge between the mission and the more operational business plan.

According to the investigation of “Research Strategy Development and Management at European Universities” (2006) conducted by Sybille Reichert for EUA, universities are focusing more on



‘strategic management’ than on ‘strategic planning’. The involvement of and dialogue with staff plays a larger role than it usually does in companies aimed at generating money for their stakeholders.

Strategic development is clearly an iterative process, characterised more by continuous dialogue and constant revisions, by identification and adoption of new opportunities, rather than by a rational design decided on high and handed down for implementation. Indeed, it can be said that strategic development at universities resembles much more what recent theoretical studies on strategy call “strategic management”. In contrast to the earlier school of “strategic planning”, followers of strategic management emphasise the management of an organisation through strategic visions, with careful attention to soft issues of internal organisation and environment, such as style, structure, climate of the organisation (Hussey 1998). They regard the focus on creativity, and thus on behavioural aspects of management and the flexible implementation of strategic visions, as more important than the rational analysis of strategic opportunities in relation to institutional strengths and the design of an institution-wide strategic plan, although the latter is often still considered a necessary first step. (p.24)

<http://www.eua.be/publications/#c398>

2.2 Elements of a university business model

The literature on how to create and implement business models is enormous. Reflections on elements of a business model are an integrated element of all business education. Here we have chosen to follow a recent book on business models by Alexander Osterwalder & Yves Pigneur: “Business Model Generation”, 2009, which has been successfully used to initiate discussion on one of the USBM partner institutions. The book has a clear structure and a pedagogical way of presenting nine elements or building blocks needed in order to create a business model.

According to the book, “A business model describes the rationale of how an organization creates, delivers, and captures value” (p. 14).

The 9 building blocks are as follows:

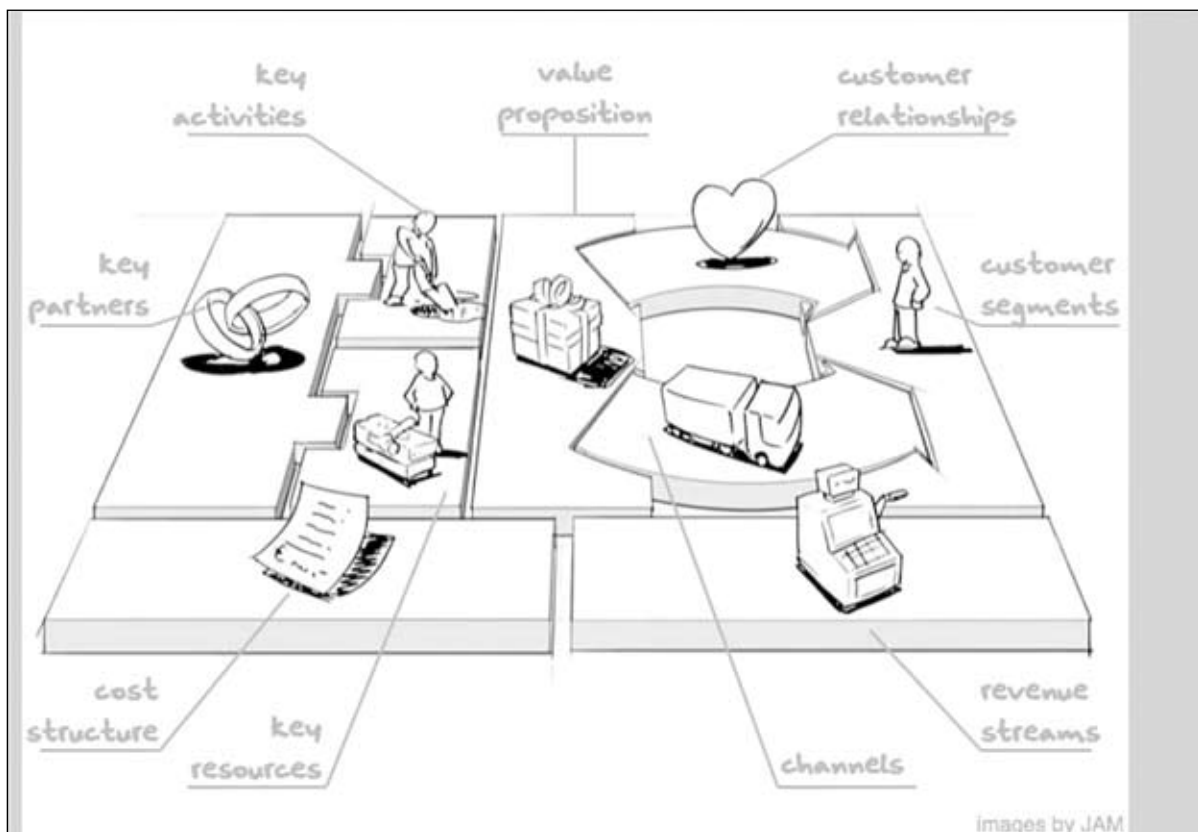
- 1: Customer Segments: An organization serves one or several Customer Segments.
- 2: Value Propositions: It seeks to solve customer problems and satisfy customer needs with value propositions.
- 3: Channels: Value Propositions are delivered to customers through communication, distribution, and sales channels.
- 4: Customer Relationships: Customer relationships are established and maintained with each Customer Segment.
- 5: Revenue Streams: Revenue streams result from Value Propositions successfully offered to customers.
- 6: Key Resources: Key resources are the assets required to offer and deliver the previously described elements...
- 7: Key Activities: ...by performing a number of Key Activities.
- 8: Key Partnerships: Some activities are outsourced and some resources are acquired outside the enterprise.



9: Cost Structure: The business model elements result in the cost structure. (p. 16-7)

<http://www.businessmodelgeneration.com/>

The following diagram illustrates the relations between the different elements (building blocks) of the business model:



From a university point of view this general business model has to be interpreted with an open mind, because public universities are different from commercial businesses and serve other purposes than earning money. Nevertheless, conceptualising the provision of lifelong learning in terms of a business model may illuminate the risks and obstacles in the operation.

We have to take into consideration that the organisation supplying the market with a product is not a newcomer, but a university with a reputation and an established range of services to the public. And the customer is not an ordinary buyer purchasing a commodity, but a student who wants to upgrade his/her knowledge or an employer wishing to upgrade the skills of his staff/workforce.

Furthermore we have to acknowledge that the values to be captured by a university are not necessarily to be counted as money. The numbers of students participating in courses and programmes might be the success factor on which subsidises are released from governments depending on the



lifelong learning policies in different countries. In some cases, participation in informal learning arrangements is seen as an obligation for a public university in return for public financing (e.g. the Pentalfa programme offered by K.U. Leuven, in “Showcases of University Strategies and Business Models for Lifelong Learning” p. 15-16 & 18-19).

In a recent publication from IBM Institute of Business Value: “Value 2.0. Eight new rules for creating and capturing value from innovative technologies”, focus on how relations with customers have become an increasingly important factor in value creation as social software is offering new patterns of communication.

For universities in general the relations to students (customers), to society – at local, regional, national and global levels - and to businesses, organisations and institutions may be as important as the actual income from offering lifelong learning. The mission for public funded universities is to serve society by delivering research, education and information at a financially break-even level.

In the next chapters we will look further at the issues that ought to be considered when formulating a university strategy and a business model for lifelong learning. The result will not be a generic model for how to implement lifelong learning in European universities. As documented in “Showcases of University Strategies and Business Models for Lifelong Learning” and discussed in the conclusion “programmes and courses in lifelong learning take many different forms” (p.35).

This diversity is the strength of lifelong learning because it shows the ability to adapt to local, regional, national and/or global needs education. For the same reason each university has to formulate its own strategy and elaborate upon its own business model based on identified demands. Hopefully this report together with the “Showcases of University Strategies and Business Models for Lifelong Learning” is able to bring considerations and examples of good practice to inspire this process.



3. TOWARDS A UNIVERSITY STRATEGY FOR LIFELONG LEARNING

When a university considers moving into lifelong learning it is a strategic decision, but it is not a strategic decision that stands alone. Building a strategy for lifelong learning has to rely upon and be integrated into the overall university strategy.

3.1 Vision, mission and values

In general, universities in Europe base their vision and mission statements and their declaration of values on “The Magna Charta of European Universities”, signed by the rectors of European universities in Bologna on September 18, 1988. Many universities, of course, have strategies of much older dates, but essentially they cover the first fundamental principle:

1. The university is an autonomous institution at the heart of societies differently organized because of geography and historical heritage; it produces, examines, appraises, and hands down culture by research and teaching.
To meet the needs of the world around it, its research and teaching must be morally and intellectually independent of all political authority and economic power.

<http://www.magna-charta.org/magna.html>

When it comes to integrating lifelong learning into the university strategy, the first three commitments for universities in the “European Universities, Charter on Lifelong Learning” to a large extent sums up the arguments:

1. Embedding concepts of widening access and lifelong learning in their institutional strategies.

Universities will grasp the opportunity to address lifelong learning centrally in their mission and strategy as part of a wider definition of excellence. The complexity of lifelong learning concepts has to be acknowledged and explored as a key aspect of developing the contribution of universities to a culture of lifelong learning.

2. Providing education and learning to a diversified student population.

European universities will respond positively to the increasingly diverse demand from a broad spectrum of students – including post secondary students, adult learners, professionals who seek to up-grade skills for the workplace, senior citizens taking advantage of their increasing longevity to pursue cultural interests, and others – for high quality and relevant higher education throughout their lifetime.

European universities recognise the important contribution that a diversified student body will make to the development of a culture of success and innovation in the institution and wider society, and the need to think how far different types of learners can interact together in a supportive mutual learning environment.



3. Adapting study programmes to ensure that they are designed to widen participation and attract returning adult learners.

Flexible and transparent learning paths need to be in place for all learners to access and succeed in higher education in all its different forms. It is an essential responsibility of universities to ensure that this educational offer is always of high quality.

European universities acknowledge the diversity of individual learner needs and therefore their responsibility to adapt programmes and ensure the development of appropriate learning outcomes in a learner-centred perspective. They also pledge to play their part in promoting widening participation and continuing education. (p. 5)

<http://www.eua.be/publications/#c398>

The motivation and key obligations for universities to become involved in lifelong learning are to widen participation, focus on learning outcomes and adapt to a learner-centred educational model. Seen in the light of the European policy framework for lifelong learning European universities' engagement in lifelong learning will raise the knowledge level of the European society and improve European competitiveness in the global market (see the chapter 1.1).

When formulating the vision, mission and value statements of a strategy plan for lifelong learning the following issues should be considered:

Why does the university want to offer lifelong learning programmes?

What are the visions for the operation in a 3-5 years perspective?

How does the lifelong learning strategy relate to the overall university strategy?

What does it imply to become a mixed-mode university serving both students at campus and at a distance in lifelong learning programmes?

Will the offering of lifelong learning - e.g. the educational concept – have an impact on the mainstream educational programmes and the way they are taught?

What are the legal requirements for taking up lifelong learning? In some countries it is a legal obligation for universities to be involved in lifelong learning (e.g. Denmark)! In other countries part-time studies as distance education have difficulties being recognised (e.g. Lithuania)! Are there any restrictions in your country on the type of programmes that may be offered as lifelong learning or continuing education for adults?

3.2 Strategic analysis: opportunities and threats

The next step is to take a critical and analytical look at the institution with a focus on its strengths and weaknesses together with its possible opportunities and threats - in other words, to make a SWOT analysis.

From the many examples of good practices and innovative solutions offering lifelong learning in



Europe, collected in the USBM project: “Showcases of University Strategies and Business Models for Lifelong Learning”, it becomes clear that there is no such thing as a singular, definitive strategy that can be generically implemented in all institutions. The strategies differ markedly depending on the size of the university and the scale of operation.

On the one hand we find high volume courses offered by the large distance teaching institutions, and on the other hand there are smaller, face-to-face courses offered by mixed-mode (dual-mode) universities. In between we find a range of different variation as documented in the cases of good practice in the “Showcases of University Strategies and Business Models for Lifelong Learning”. Each example is an answer to meet a specific situation depending on the mission of the university, the legal national framework and the demand from students/ employers. Sometimes institutions are able to offer a course in different versions, one to a large generic audience and another, a more tailored style of course, to a smaller niche audience, which meet special requirements (e.g. The Open University, UK, see: “Showcases of University Strategies and Business Models for Lifelong Learning” p. 32-33).

Furthermore, courses and programmes have different delivery styles. They range from wholly face-to-face teaching at one extreme to wholly online teaching at another and with a rich diversity of blended learning in between.

Finally, programmes and courses have different objectives and learning outcomes. They range across a spectrum from formal through non-formal to informal learning.

Formal learning: structured periods of learning with evaluative assessment that enables students to earn credit towards recognised awards and qualifications; examples include modular courses taught and assessed by universities which can be counted towards undergraduate or postgraduate degrees and diplomas.

Non-formal learning: structured periods of learning that may include formative assessment but which do not lead to the award of academic credit; examples include professional development courses which build professional competence;

Informal learning: loosely structured periods of learning which rarely include assessment and which do not lead to the award of academic credit; examples include open educational resources developed and made available online by universities to anyone who wishes to study them.

“Showcases of University Strategies and Business Models for Lifelong Learning” p. 17

So far formal learning has dominated within the university sector. BA and MA degree programmes are formal learning with exams and degrees and many of the lifelong learning courses and programmes offered by the same institutions are also within an accredited national structure. But not all lifelong learning students make use of the accreditation and take the exams. They are only interested in the learning, not in the formalities.

Increasingly, universities are offering non-formal education aimed at specific companies/ institutions and fully financed by these, or at the general public in form of open lectures. In both cases the courses are structured but without formal assessment at the end.

Furthermore, there has been an increase in the offering of informal learning by universities. Within



the open educational resource (OER) movement, some universities are supplying open access to their course material (e.g. MIT, US). Other universities are going further and providing small open courses prepared for self-study as open educational resources (e.g. the open universities within EA-DTU, see “Showcases of University Strategies and Business Models for Lifelong Learning”).

Basically, lifelong learning strategies have to be adapted to the local situation taking into consideration national legal regulations, financial options, and labour market requirements, among other more specific issues such as local and regional challenges.

When deciding on the objectives of a strategy plan for lifelong learning and planning the different strategic steps to take, the following issues should be considered:

What are the strengths of the institution? *Is the university basically known for its research in certain areas? Or is it known for the high-class education it provides? Is it primarily providing education for the private sector or for the public sector? Is the university mainly serving the nearby region or is it operating on the national level or even on the global arena within a certain language area? Does it have special relations with companies?*

What are the weaknesses of the institution? *Are the programmes offered, taught in very curricula and classroom bound ways that has to be totally reorganised in order to become student-centred flexible learning? Does the university have a net-based infrastructure to support students at a distance or in a working position as e-learning? Does the teaching staff have to be re-educated in order to facilitate a different group of learners?*

What are the opportunities for the institution? *Does the strength of the university – or some of the strong points – match the needs of a group of learners? If yes, does the university have an opportunity to create a course or set up a programme for this segment of learners? Are there companies or public institutions in the region or in the country that have a specified need for upgrading their staff within an area where the university has the competences? Again, if yes, does the university have the possibility to develop a further education programme to fulfil these needs?*

What are the threats facing the institution? *Are there other institutions within the region or the country – maybe even globally – which have the same competences and are they already offering courses in the area? Is the model for financing the development and delivery of courses and programme viable? Does the staff support the idea of offering lifelong learning in the proposed areas? Otherwise internal problems could arise!*

Informed by the key findings of this analysis the university may decide upon a strategy for lifelong learning, based upon its programmes and the strengths of the institution whilst focusing on how to address its weaknesses. Opportunities can thus be investigated and elaborated further upon, in the business plan, which also sets out to reduce and avoid threats.



4. TOWARDS A UNIVERSITY BUSINESS MODEL FOR LIFELONG LEARNING

The aim of a business model is to turn the strategy into action with concrete goals, a timeframe and financial plans. The diagram on page 18 organises the 9 elements or building blocks into 3 clusters on market relations – covering customer segment, value propositions, channels and customers relationships, on production and delivery – covering key resources, key activities and key partnerships, and on financing – covering revenue streams and cost structure.

4.1 Market relations

The fundamental question is not what the university wants to offer, but what the lifelong learner requests – only when the two are successfully matched, will a sustainable operation will occur. Based on the analysis of the educational strong points of the university and the opportunities for successful delivery of specific courses and/or programmes for learners (or companies and institutions) in need of further education, decisions to explore the market should be taken.

An analysis of a market for lifelong learning should answer the following questions for the university:

Do we have courses or programmes that learners outside of our traditional cohort of campus-based students need, or do we have the expertise to create such courses or programmes (a value proposition)?

*Who are the learners and how are they segmented (customer segments)?
How are we going to reach and deliver our courses to these groups of learners (channels)?*

How do we service the learners (customer relationships)? Which sort of communicative infrastructure and learning support should be in place for these non-campus-based learners?

When dealing with traditional university education for young people (18-25) taking their first degree it is to a large degree possible to predict the number of students that will apply the following year. But when it comes to adult students taking part in lifelong learning it becomes much more uncertain. Their family situation plays a much bigger role and so does their work situation. A new job position may exceed workload expectations so that a planned lifelong learning course has to be cancelled. An extensive order to the enterprise may involve an additional workload burden, which postpone plans for further education. Nevertheless, these uncertainties do not alter the condition for universities. They have to recruit sufficient numbers of students for programmes and courses in order to have a viable business.

For most universities the primary factor determining the success of a programme is the number of students. If a module or program is not successful, meaning the number of participating students is low, the program or course will be discontinued.

Behind the issue of recruiting sufficient numbers of students, money, of course, plays a decisive role, but the issue is seldom reflected as such. As we will return to later, money is more directly involved



in the decisions on educational formats to be chosen for delivery of the module, course or programme, and on resources to invest in pre-production.

Universities in large countries or ones offering courses to large language areas are operating with student numbers and economical resources that are considerably larger than universities in smaller countries that have to fulfil the same educational needs for lifelong learning in the societies they serve.

Before making the final decisions to develop a module, course or programme it is essential to identify factors that are important for facilitating the success of this course or programme:

Is a similar course being offered by competing institutions – meaning that both partners may recruit so few participants that none of the offers will reach a sufficient number to break-even?

How many lifelong learners have a need for or an interest in the course and are likely to sign up for it?

Is it likely that employers will pay the tuition because the course has a direct relevance for companies; or will it have to be paid out of the learner's own budget because the course is more likely to be part of a personal career planning?

Are there requirements that the student has to fulfil before being accepted on the course/ programme - e.g. other courses, former degrees/certificates or previous work experiences?

Does the course require specific language skills – e.g. ability to read and study texts in English?

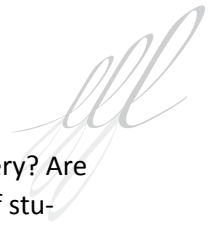
Furthermore, questions on how to deliver the course – the educational format - and how to service the learners – communication with the learners - have to be considered. These issues will be discussed in the following paragraph dealing with the production of courses/ programmes.

4.2 Production and delivery

It is essential for a business model that there is a product (a course or programme) that fulfils a need for a customer (a learner) in such a way that he/she wants to purchase it (by signing up for the course/programme). Therefore the production the course/programme, its delivery to the students and the ways these are going to be serviced plays a decisive role for the decision a university has to take, when it enters into provision of lifelong learning.

In relation to production and delivery of courses/programmes, servicing of lifelong learning students and their recruitment, the following questions should be answered:

Do we have the key competences in-house to produce the courses and programmes we plan to offer (key resources)? Or do we have to go into partnership with other educational institutions (key partnerships)?



Are we able to finance the development of courses/programmes in a period prior to delivery? Are we willing to run the risk of investing in a course that will not attract a sufficient number of students?

Do we have the communication and service infrastructure in place in order to deliver the course and serve groups of students studying at a part-time basis and at a distance?

Are we able to facilitate collaboration and communication among the students and between students and tutors/teachers? Are the staffs familiar with the pedagogical potentials of using social software to operate in an on-line learning environment?

Are we able to recruit these new segments of students by advertising the courses/programmes (key activities) or do we have to outsource this activity (key partners)?

The money available and the size of the student audience heavily influence the choice of educational format.

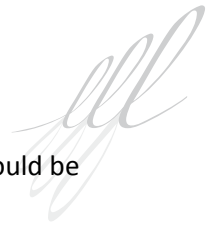
Universities in large countries or those offering programmes for huge language communities are more likely to recruit bigger audiences for their courses. Consequently they are able to invest more resources in the form of money and manpower in the development of new courses than institutions in smaller countries serving smaller language areas.

The open universities in Europe invest many resources in producing the educational material for self-learners with a combination of new written textbooks, additional course books with relevant articles, CDs with audiovisual material and interactive learning objects and/or dedicated course web-sites – all kept together by an instructive study guide. Furthermore a network of study centres that offer tutorials, and/or on-line tutorials support the delivery.

Mixed-mode universities in smaller countries have to find other ways to fulfil the same needs for upgrading the workforce in their area and for offering lifelong learning in less costly formats. An often-used concept is to organise the educational material in a “pick and mix” or “cut and paste” way. Texts, video & audio materials and open source interactive resources are collected on the course web-site and presented to the students through an elaborated study guide. This concept may not be as thoroughly thought through from a pedagogical point of view as the one presented by big open universities, but it is far cheaper than producing every educational unit from scratch. Furthermore it is possible to produce a course or module faster within the pick and mix concept. The final finishing of a course or module may be postponed until a few months before delivery when the registration of students for the course is known.

Also on delivery, mixed-mode universities have to be very cost conscious. Often delivery will incorporate some face-to-face seminars in combination with on-line discussions and guidance. Increasingly, social software is incorporated in order to create a dynamic learning environment for the lifelong learners.

It also plays a decisive role whether the university has research and teaching expertise among its staff and whether courses and programmes are already on offer within the area for full-time students on campus, or it has to hire new experts.



When choosing the educational format for a course or programme the following issues should be considered:

How many resources – both in terms of money and manpower – are available for preproduction of educational material?

How much self-produced educational material is it possible to provide for the course/module?

Does the course/programme include some hand-on experiments to be carried out in special laboratories? Does that require agreements with other institutions?

How much manpower – professors, lecturers and tutors – will be involved in the delivery of the course/programme and for how many working hours?

Does the university have the technological infrastructure (on-line communication and management systems) and the pedagogical expertise to offer the course/programme as e-learning (broadly understood as both delivery of course material, student support and on-line collaboration)?

Does the targeted student population have the sufficient IT-knowledge to be taught on-line or is an introduction to computer-mediated communication needed?

Are the lifelong learners recruited from a closed geographical area that will make it possible to organise the delivery as a combination of face-to-face seminars and e-learning?

Is the course or module part of a degree programme (formal learning) to finish with an exam or is it a part of a non-formal offer to upgrade citizens in general? This will influence the way learning tasks are incorporated into the delivery – e.g. numbers of assignments.

A possible fruitful way of producing educational material is through open courseware and open educational resources as mentioned above. In Europe especially the open universities are experimenting with this option, but, at the moment, it is too early to tell if it is a sustainable business model. Based on these considerations of market relations and options for production and delivery more specific financial decisions may be adopted and incorporated into the university's overall response to the challenge of offering lifelong learning.

4.3 Financing

Often a business model is used solely as a plan for assessing the revenue that it is possible to generate within the market, whilst identifying the costs involved.

When it comes to universities entering the area of lifelong learning provision generating income – earning money – is certainly an important issue, but it is not the only reason for entering the business. Political demands and societal obligations often play a bigger role for a public university.

The mission of a university is not to earn money, but to provide society with research and



education. At the same time, this should be done in a responsible way whilst getting value for money and avoiding unnecessary costs. Especially, when moving into the area of lifelong learning it is important, that the revenues and costs are in balance within a few years.

In relation to financing the following questions should be answered as part of the overall business model for providing lifelong learning at a university:

How do we finance the development of lifelong learning courses/programmes – both manpower, material and infrastructure? From which sources do we receive our income (revenue streams)?

How are our costs distributed (cost structure)? What are the fixed costs – e.g. investment in the production of the course/programme - and what are the variable costs – e.g. expenses for delivery to each student?

How many students do we have to recruit in order to reach a break-even point for revenue and cost – and how many years will it take to reach this point?

In Europe, the conditions for financing lifelong learning courses/programmes are very different. In some countries, attending university education is free of charge or entails only a very small tuition fee (e.g. Sweden and Germany). This goes for full-time students as well as for students in further education – lifelong learning. The university receives government funding to cover its costs.

In other countries all the costs for developing and delivering lifelong learning courses and programmes have to be covered by the students signing up for the education (e.g. the UK). In between, we find a huge variety of models. Students pay fees, which in combination with grants from governments cover the costs of development and delivery (e.g. Denmark). But there is a considerable difference in operational freedom for the institution whether the grant is regulated per student signing up for the course or as a yearly paid sum.

Therefore the following issues should be taken into consideration:

From which sources does the university receive the funds necessary for providing lifelong learning?

To what extent is the revenue dependent upon student fees – e.g. due to government regulations? Will it be easier to reach a break-even point with more students supported by government grants and paying low fees than the other way around?

How many times and with how many students does the course/programme have to be offered before the development costs have been paid – assuming that the delivery costs are calculated per student?

Does the programme aim at an audience for whom the fee is irrelevant or of minor importance or even prestigious – e.g. programmes for executive levels in companies?

Is it possible to develop and deliver a course with a high and competitive content that fulfils the quality standards of the institution for a price that students/companies are willing to pay?



Does the delivery format place considerable additional costs on the students - e.g. travelling and accommodation for face-to-face seminars, lab-work, exams or study materials?

When these financial issues are taken into account together with the market relations and the options for production and delivery, the university should be in a position to make a decision on whether it would be viable to provide lifelong learning or not.



5. ORGANISING LIFELONG LEARNING – CONCLUDING REMARKS

The final decision on entering into lifelong learning provision has to be taken by the university on the basis of both strategic considerations and a viable business plan. It is important that the institution has a clear strategy for why it wants to offer lifelong learning and what it wants to achieve by the operation. At the same time, it is crucial that the operation is solid in both political and economic terms, taking into consideration the opportunities and threats facing the university. In other words, as an analytical operation the university strategy and the business plan may be dealt with separately, but in practice, they are interrelated and form a whole for decision-making.

As we analyse the many examples of good practices and innovative solutions among universities that offer lifelong learning in Europe, it becomes clear that there is no such thing as a singular, definitive strategy and business model that can be generically implemented in all institutions.

Although high priority has been given to lifelong learning on the European educational agenda since the late 1990s the implementation has been slow among conventional universities, but not among the open universities.

In many ways, European lifelong learning is well served by its dedicated open and distance teaching universities. They are labelling themselves LOF universities (Lifelong Open and Flexible Universities) due to the specific target groups - lifelong learners - they serve, and to the educational model - an open and flexible learning paths – they offer. They have developed from second-chance universities into further education and lifelong learning institutions. Their focus is on the development of learning materials in a distance-learning context, primarily meant for independent self-study. The content is rich in pedagogy and didactics and incorporates learning guidance and tutoring elements, designed to be accessible to individuals, studying at home or at work. The learning process takes place in an online – virtual - learning environment, which supports various kinds of interaction: student-student as well as student-tutor or teacher, both individual and grouped.

But not all European countries have chosen educational models that allow the creation of LOF-universities (e.g. the countries in Northern and Eastern Europe). In these countries conventional universities have to turn into mixed-mode institutions to fulfil the same obligations towards society. Even in countries with dedicated Lifelong Open and Flexible Universities, conventional universities may be encouraged to take up lifelong learning in order to serve a market and to respond to a societal need that according to the prognoses are growing. These institutions may learn a lot from the LOF-universities and from already existing mixed-mode universities, but as mentioned above, lifelong learning strategies and business models have to be adapted to the local situation taking into consideration national legal regulations, financial options and labour market requirements, among other more specific issues.

In order to reach the goals formulated in “Europe 2020, a European strategy for smart, sustainable and inclusive growth” lifelong learning plays an important role, that in order to be fulfilled should build on increased collaboration among universities in Europe – both open universities and traditional universities that have become mixed-mode universities.





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