

Human Capital and Capability Approach in European Lifelong Learning Development: A Case Study of Macedonia in the Balkan

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Abstract—The paper discusses European Lifelong Learning policy in the European enlargement to the Balkan. The European Lifelong Learning policy with Human Capital approach is researched in the country case of Macedonia. The paper argues that Human Capital approach focusing on instrumental and economic importance of learning for employability and economic growth needs to be complemented with Capability Approach for intrinsic and non-economic needs of learning among the ethnic minorities. The paper identifies two dimensions of importance – minority languages and civic education – that the Capability Approach may develop to guarantee equal opportunities to all to benefit from European educational and lifelong learning development and to build an inclusive and socially just democracy in Macedonia.

Keywords—Capability Approach, European Lifelong Learning, Human Capital Theory.

I. INTRODUCTION

THIS paper aims to contribute to the contemporary discussion of the need to improve educational policy and practice in order to guarantee equal opportunities to all to benefit from educational development and to strengthen the role of education in promoting social justice [1].

The paper aims to research European Lifelong Learning (LLL) policy with respect to equal opportunities and social justice in the European development [2]-[3]. The theory models of Human Capital Theory (HC) and Capability Approach (CA) are researched to explore LLL in the external development of the European Union (EU). The paper focuses on European LLL development in the European Enlargement to the Balkan region, where the interest of the EU is to stimulate economic growth and to reinforce peace, stability and democracy [4]. The country of Former Yugoslavian Republic of Macedonia¹, which has a lower level of human development, ethnically diverse population and an unequal distribution of income, is researched as a case study in the paper [5]-[6]. Macedonia is currently developing LLL policies and strategies with the support of Europe Aid programmes, where the role of the researcher is to provide international expertise.

The paper sets out to research the questions:

1. Which theory model of LLL guarantees equal opportunities to all to benefit from educational

¹ The name Macedonia is used in the paper to refer to the official name of the country.

- development in Macedonia?
2. What is the role of LLL in promoting social justice in Macedonia?

Human Capital is defined as the capacity of human beings as productive agents to promote and increase income, production and development through acquisition of skills and accumulation of knowledge [7]-[8]. Capability Approach is not easy to define in short, but it broadly refers to a conceptual model, where capabilities are the real opportunities to achieve valuable states of being and doing, and the freedoms people actually enjoy to choose the lives that they have reason to value [9]-[10].

Human Development Index (HDI), which is an indicator of the average achievements in the field of human development, is used in the paper to measure equality in education in Macedonia [5]. HDI measures three basic dimensions in human development (HD): a long and healthy life as measured by life expectancy at birth; knowledge as measured by the adult literacy rate and the combined primary, secondary and tertiary gross enrolment ratio; and a standard of living as measured by GDP per capita [5]. In the scope of the paper, the research is limited to disparities of HD among ethnic groups in Macedonia.

First, the paper researches the historical background linked to the present level and challenges of HD in Macedonia. Second, the paper researches the European conceptualization of LLL with HC approach in comparison with other global multilateral agencies. The shortcomings of European LLL are analysed in the context of the country case of Macedonia. Third, the paper presents CA as a complementary approach to HC in the European LLL for improved global equality and social justice in the European development assistance.

II. BACKGROUND OF HUMAN DEVELOPMENT IN MACEDONIA

The history of the Balkan region, which is that of conflict and war until our times in the 1990s in Europe, has been largely studied in current literature [11]-[15]. As the researchers suggest, the reasons for the wars in the Balkan region are:

1. Collision of cultures between the East and West; Orthodox and Muslim religion in the East vs. Protestant and Catholic in the West;
2. Mountainous geography and the development of sub-national groupings with ethnic identities; urban vs. rural

tensions among the population;

3. Interests of superpowers and their rivalry for the area; little power of people to decide on their national identities; economic dependency on superpowers.

Sen argues that while the theory of the clash of civilizations is the most influential attempt to explain violence, it does not provide a sufficient explanation on its own, but needs to be complemented with theories of the political economy of power and inequality [16]. Therefore, according to Sen, violence needs to be understood both in terms of social inequality and deprivation as well as in terms of identity and cultural factors.

Macedonia became an independent nation in 1991. The population of Macedonia (2.02 million) is ethnically diverse: Macedonians 64.2%, Albanians 25.2%, Turks 3.9%, Roma 2.7% and other minorities 5% of the population. Since December 2005, Macedonia has the status of candidate country of the EU. However, the question of the Macedonian nation is problematic still today and the national identity is contested from several directions - the EU and the US as superpowers and Bulgaria, Greece, Serbia and Albania as neighboring nations [17]- [18]. On one hand, the EU would like to see the development of a multi-cultural society in the country, with no ethnic group dominating the others. On the other hand, Macedonians as a culturally dominating group claim to their right to retain a Macedonian nation state and are unwilling to comply with the Albanians' demands for a status of a constituent nation with Albanian as a second state language. Therefore, there is a tension between the Macedonians' fear of loss of national identity and the interests of the neighboring nations and the superpowers.

According to the Human Development Report (HDR) 2006, Macedonia ranks 66th out of a total 177 countries in the index, with HDI of 0.796 falling among the middle level countries of global development [5]. The HDR 2004 identifies a high rate of poverty (33.54%), significant disparities in HD between the urban and rural populations and between men and women [19]. The official unemployment rate for ethnic minorities is high; Albanians, Turks and Bosnian Communities report unemployment rates of around 60%, and Roma population 80% [20]. The inequalities in Macedonian society related to the different ethnic groups, the urban-rural population and gender are reflected in the country's education provision and attainment. Firstly, there is a high drop-out rate among the ethnic groups. Secondly, ethnic-based disparities are particularly evident with regard to gender. While ethnic Albanian, Turkish or Roma girls are equally included in elementary education, their participation is much lower at the secondary level [19]. Taking into account the existing disparities in HD with regard to ethnicity and gender, the challenge of Macedonia, and the assistance of the EU, is to develop an inclusive model of LLL to guarantee equal opportunities to educational development to all. The challenge is also to strengthen the role of LLL in promoting social justice in the society of Macedonia.

III. THE CHALLENGE OF HC APPROACH IN EUROPEAN LLL DEVELOPMENT

The global institutions and supra-national bodies, like the EU, have significant power and influence in shaping key ideas and policies about education in development [21]-[23]. The international development organisations, for example OECD, the UN agencies and the World Bank are advocating lifelong learning, but with a variety of interpretations [24]. While UNESCO's LLL concept, first formulated by Faure (1972) and later by Delors (1996) advocates a deeper and more harmonious form of HD to reduce poverty, exclusion, ignorance, oppression and war, the European Commission and the World Bank are stressing primarily the economic rationale of LLL [24]-[26]. The European Commission conceptualises LLL as 'all learning activity undertaken throughout life, with the aim of improving knowledge, skills and competences within personal, civic, social and/or employment-related perspective' [27]. Schuetze argues that the lifelong learning concept of international development organisations with a strong human capital agenda is influenced by Western industrialised countries and the industry for pushing and legitimising their own political agendas [24].

Lifelong learning can play several roles for individuals and society. For the purpose of the research a typology of various roles of education, developed originally by Drèze and Sen and modified by Robeyns, is applied to LLL in Macedonia to analyse the theories of HC and CA [28]-[29]. In this paper the dimensions of intrinsic vs. instrumental, economic vs. non-economic and personal vs. collective roles of education are researched [28]. The European LLL with HC approach focuses on the instrumental and economic value of learning for a person and a collective [8]-[28]. The personal importance of LLL with economic value is for example when a person acquires knowledge, skills and competences for improved employability in the labour market, to generate income or to reduce poverty. An example of collective importance of LLL with economic value is when a country initiates a basic skills programme to improve skills levels of workforce to improve the level of employment and productivity. The HC approach in LLL, which focuses on instrumental and economic aspects of human development, generates income and alleviates poverty at the micro level [8]. At the macro level, HC approach in LLL raises productivity and increases economic growth, which is vital in the new economic reality in Macedonia after the socialist era [8]-[19].

However, there are shortcomings related to the model of HC in LLL with respect to provision of equal opportunities and promotion of social justice. It can be argued that not all benefit equally from education as an income-generating activity due to internal or external restrictions [28]. While internal restrictions refer to physical or mental disabilities, external restrictions are more profoundly social and cultural in nature [28]. These restrictions are reflected in the high drop-out and unemployment rates of ethnic minorities in Macedonia [20].

Furthermore, it is argued that school education, which is the

basis for continuing lifelong learning, may play a role in the formation of external restrictions. As Unterhalter argues, gender, ethnicity, class and marginality shape social structures and relations in education in ways that entail unequal access to resources and undervaluing of the views of certain groups [30, 31]. Undervaluing the culture of certain groups in a society results in the loss of identity of people and the under-utilisation of their human potential [31]. Freeman discusses educational expulsion or suspension and culture of exclusion to describe the external restrictions that general education may cause, which results in non-monetary and monetary costs at individual and societal levels, for example unemployment, social exclusion and even crime [31]. The educational expulsion can be identified in the high drop-out rate of ethnic groups and the ethnic-based disparities in education attainment [19]. The LLL model in Macedonia needs to guarantee equal opportunities of learning also to people with external restrictions to improve employability and promote social inclusion in development.

Finally, it can be argued that different groups of people may have different values regarding the role of education and learning, which may be cultural, social or other non-material dimensions. To sum up, applying solely the HC approach in European LLL development, focusing on instrumental and economic aspects, would leave out other intrinsic and non-economic dimensions, which the capability approach may help to conceptualize [28].

IV. OPPORTUNITIES OF CAPABILITY APPROACH IN EUROPEAN LLL DEVELOPMENT

CA has emerged as a leading alternative to standard economic frameworks for thinking about human development, poverty, and inequality during the last decade, but it is still not widely researched in the context of LLL [9, 10, 30, 32]. The conceptual foundations of CA emphasises functional capabilities or substantial freedoms that people have reason to value, instead of utility (happiness) or access to resources (income, commodities). The emphasis is not only on how human beings actually function but on their having the capability to function in ways they value. Poverty is understood as capability-deprivation, where people can be deprived of capabilities in many ways, for example government oppression or lack of financial resources [10].

The CA views people not as means but as ends, recognizing human heterogeneity and diversity through differences in personal functionings [10]. It draws attention to group disparities such as those based on gender, race, class or age and acknowledging that different people, cultures and societies may have different values and aspirations [10]. Therefore, CA helps to develop a European LLL model in Macedonia, where people from different ethnic groups can develop learning with non-economic importance to enable them to function in ways they have reason to value to develop their human potential. The CA emphasises that it is the people directly involved who must have the opportunity to participate in deciding what should be chosen, including those

marginalised, who lack basic capabilities, which applies also to LLL development among the ethnic minorities in Macedonia [9]-[30].

The question of minority languages in Macedonia may be one example of LLL in Macedonia developed with CA of non-economic importance. In Macedonia, ethnic boundaries do not coincide with political boundaries, and there is a tension between the culturally and linguistically homogeneous nation state of Macedonia on one hand, and the multi-ethnic and multi-linguistic reality, on the other [33]. The CA widens the LLL model to include equal opportunities of education in the native language of the ethnic minority groups to build their cultural identity, to value their culture and to build social and cultural capital, in a dialogue and interaction with other cultures, to build a multi-cultural society of Macedonia [31]-[33].

The question of valuing ethnic and cultural diversity and the view of 'no ethnic group dominating the others' leads to the question of equal representation of the different ethnic groups in developing a pluralistic and democratic society in Macedonia [17]. Nussbaum brings the notion of empowerment and democratic citizenship in CA and argues that an adequate education for living in a pluralistic democracy must be a multi-cultural education involving fundamentals about the histories and cultures of the many different groups with whom they share laws and institutions [32]. Therefore, CA approach widens the discussion of the role of education beyond the economic importance to promote social justice and democratic governance [34]. Civic education in terms of what kind of education might be required for citizens of pluralistic and democratic societies is discussed in current research literature [34]-[35]. While the discussion in the research emphasises the need of civic education at school to build future democratic societies, the paper argues that civic education needs to be part of LLL in post-war countries like Macedonia. Civic education in LLL at collective level may promote equality and social justice among the different ethnic groups of Macedonia to reinforce peace, stability and democracy in the country and the Balkan region.

V. CONCLUSION

The paper concludes that European development of LLL with HC focus may not provide equal opportunities to all to benefit from educational development in the Balkan country of Macedonia. Therefore, the theory model of LLL with HC focus needs to be complemented with CA to allow learning with intrinsic and non-economic importance and with social and cultural dimensions, at personal and collective level. While HC approach is important for employability, improved production and economic growth, CA can be argued to be equally important as a theory approach in European LLL development to level the current disparities in HRD in Macedonia. The paper identifies two aspects of importance - minority languages and civic education - that the European

LLL model with non-economic CA may develop to guarantee equal opportunities to all to benefit from European LLL development and to build an inclusive and socially just democracy in Macedonia.

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