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Comparing Adult Education and Lifelong Learning in Europe and beyond: An introduction

Context: Würzburg Winter School 2015

This book is the result of a ten-day Winter School at Julius Maximilian University of Würzburg in January and February 2015 on 'Comparative Studies in Adult and Lifelong Learning'. The Winter School was dedicated to analysing and comparing international and European strategies in lifelong learning. Based on social policy models, lifelong learning strategies in Europe were subjected to a critical analysis. Furthermore, subtopics of lifelong learning were chosen for in-depth comparison and an analysis of selected topics of (European) adult education and lifelong learning.

The Winter School was offered for the second time in 2015, following a first event in 2014. It brought together 51 participants (master's and doctoral students) and 20 professors and lecturers from six European countries, India, North America, and Africa. Most participants are enrolled in programmes that have a focus on questions of adult education and/or lifelong learning. The Winter School is offered in collaboration with diverse partner universities and one partner institute: Universidade do Minho, Portugal; Universidade de Lisboa, Portugal; Universitá di Padova, Italy; Università degli Studi di Firenze, Italy; Technische Universität Chemnitz, Germany; Pécsi Tudományegyetem, Hungary; University of Delhi, India; Jawaharlal Nehru University, India; and the International Institute of Adult & Lifelong Education, New Delhi, India. Academic experts in adult education of the partner universities are involved in the teaching programme. They also send students from their universities to Würzburg and support them in advance. The winter school was public announced and reached also participants outside of other universities in Germany, Europe, North America and Africa. Participants meet in Würzburg for an in-depth study of European policies in lifelong learning, their relevance in adult and continuing education practice, and the comparison of selected aspects of adult education and lifelong learning. The inclusion of Indian partners in particular brought a new challenging perspective for the comparison of adult and lifelong learning. This perspective was experienced to be as valuable as the European perspectives.

This volume gives young researchers a possibility to publish the results of their discussions in Würzburg and their further work. Due to the sponsorship of the German Federal Ministry of Education and Research (BMBF) as part of a program for supporting young German education researchers, the volume has a special focus on supporting German fellows. They, together with their international fellows, have contributed comparative papers on questions in adult education and lifelong learning.

From a didactical perspective, the Winter School is divided into a preparatory phase and two main parts. Participants prepare for the two main parts of the Winter School: (Part 1) Lifelong learning strategies in Europe, and (Part 2) Comparing lifelong learning. In preparation for Part 1, participants get a reading exercise based on some research papers and a study guide on European strategies in lifelong learning, authored by Licinio Lima and Paula Guimarães. Master's students who study at one of the partner universities attend local tutorials for preparing, discussing, and understanding the texts. For Part 2 of the Winter School, all participants choose one comparative group (e.g. training the adult education trainers, adult learning, and adult education participation). Based on their selection, they prepare a country report on the situation in this field in their home country. All participants submit this country report two weeks before the Winter School. Each group has an international expert on their topic as moderator. The moderators provide online support to the participants in advance to help them prepare the paper. This means an intensive preparation phase for the participants and highquality discussions throughout.

All participants met in late January 2015 in Würzburg to start Part 1 of the Winter School, which was moderated by Licinio Lima and Paula Guimarães in two different groups. Part 1 lasted from Wednesday till Tuesday. Participants developed a shared understanding of international discourses and the international terminology in adult and lifelong learning policies. Furthermore, all participants were introduced to the analysis of lifelong learning strategies of European stakeholders and local actors in adult and continuing education. Therefore, three models of education were distinguished: the democratic-emancipatory model, the modernisation and state control model, and the human resources management model (cf. Lima, Guimarães, & Touma, in this volume). During the discussion of the models several practice examples from participants' home countries were discussed. Afterwards, an analytical scheme was developed, and participants were introduced to practice observation. Based on this analytical background, participants went on field visits to local adult and continuing education providers (civic education, vocational and professional continuing education, and family education). Moreover, representatives of European

associations in adult and continuing education were invited (Gina Ebner, European Association for the Education of Adults (EAEA); Dr. Alexandra Dehmel, European Centre for Vocational Education and Training (CEDFOP)) to discuss their lifelong learning strategies. Based on these insights into practice, participants researched lifelong learning strategies of that practice based on their theoretical models. This analysis gave the participant group a shared vocabulary, which they went on to use for the comparisons in Part 2 of the Winter School.

Part 2 was dedicated to the comparison of selected topics in adult and lifelong learning and lasted from Tuesday till Friday. During Part 2, the group was divided into six comparative sub-groups, which worked on the following topics: 'Training the Adult Education Trainers', 'Adult Learning and Adult Education Participation', 'Quality in the Adult Learning Sector', 'The Policy and Practice of Lifelong Learning for the Knowledge Economy', 'Professionalisation in Adult and Continuing Education', and 'Educational Guidance and Counselling'. The comparative groups were made up in a way to reflect participants' research interest (e.g. in PhD thesis) and to ensure an international mix with participants from different countries. Each comparative sub-group used the following structure (see also Section 2 of this introduction): introduction to the topic, country presentations by participants, development of categories, testing of categories, as well as interpretation and comparison. From Wednesday afternoon, participants worked independently in their groups, which ended on Friday with an open space presentation during which all groups presented the results of their group work.

Lifelong Learning Strategies Preparatory Comparing Lifelong Learning in Europe Introduction into Comparative Education International Classes Preparatory on European Educational Policy & **Comparative Groups** Reading **Analysing Models** (1) Training the Adult Education Trainers European Policies in (2) Adult Learning and Adult Education Lifelong Participation Discussion **Field Visits** Learning (3) Quality in the Adult Learning Sector Practitioners & Providers of European Adult & (4) The Policy and Practice of Lifelong Continuing Stakeholders Learning for Knowledge Economy in Lifelong Education Learning in Würzburg (5) Academic Professionalisation in Country Adult and Continuing Education Report (6) Educational Guidance and Counselling Reflection Comparison Bringing together Theory & **Practice Observations** Poster Presentation Würzburg Part 1

Figure 1: Würzburg Winter School 2015 (Egetenmeyer, 2014).

This volume is based on the result of these two phases, expanding on the comparisons of the second phase. Therefore, participants of the Winter School were invited to identify selected comparative aspects (categories) of their groups and choose relevant countries. Whereas the comparative group work included five or more comparative countries, the papers collected in this volume focus on fewer countries. This allows for a deeper interpretation of similarities and differences. And whereas the group work during the Winter School only achieved the stage of juxtaposition for the most part (i.e. identification of similarities and differences in a side-by-side comparison), the papers also include initial interpretations of these juxtapositions.

Current bibliometric analyses of research papers in adult education (Käpplinger, 2015, Rubenson & Elfert, 2014, Fejes & Nylander, 2013, 2014) show that there are only few papers available that were written by authors from different national backgrounds. So-called 'international papers' in adult education frequently focus on a limited range of countries (e.g. Anglo-Saxon countries). Käpplinger (2015, p. 17) summarises: 'Encouraging multiple authors with bi- or even trinational backgrounds might be one way in order to encourage more comparative research.' The Würzburg Winter School gives participants an opportunity to publish together in multi-national teams for supporting qualitative comparative research in adult and continuing education. Based on the papers, we see a strong potential for further collaboration between the young researchers focusing on questions in adult and continuing education.

Comparative Approach of the Winter School

Adult and continuing education is a discipline that has a long tradition of international comparisons, but those international comparisons are also highly fragmented (cf. Schmidt-Lauff & Egetenmeyer, 2015). As adult and continuing education is a phenomenon that has evolved very different from one country to the next, looking to experiences of other countries is an obvious activity. But as adult and continuing education is a rather small discipline in many countries, comparison hardly goes beyond single research projects. Comparing adult and continuing education in different countries means getting familiar with very different systems, contexts, and developments. A proposal for a joint research frame, as the one proposed by 'the cube' (Bray & Thomas, 1995) in school education, is not available in adult and continuing education. Even the development of internationally comparable classifications (e.g. ISCED) has only begun to inform discussions of the European Qualification Framework. Moreover, this classification only covers parts of adult education. In Germany, comparative research in adult and

continuing education is currently available in four ways (cf. Egetenmeyer, 2015a): subject-related country studies, juxtapositions and interpretative comparisons, comparisons with a focus on cultural theories, and methodological studies.

According to Chaters and Hilton (1989), the interpretation of comparative data can be understood as the main target in comparative research:

A study in comparative international adult education must include one or more aspects of adult education in two or more countries or regions. Comparative study is not the mere placing side by side of data concerning one or more aspects of adult education in two or more countries. Such juxtaposition is only a prerequisite for comparison. At the next stages one attempts to identify the similarities and differences between the aspects under study and to assess the degree of similarities or differences. Even at this point the work of comparisons is not complete. The real value of comparative study emerges only from stage three – the attempt to understand why the differences and similarities occur and what their significance is for adult education in the countries under examination and in other countries where the finding of the study may have relevance. (Charters und Hilton, 1989, p. 3)

To reach this interpretation, several interpretation variations can be used (cf. Egetenmeyer 2015): The interpretation can be understood especially as a challenge concerning large-scale data. These are available through the Adult Education Survey (AES), the Continuing Vocational Education Survey (CVTS), or the data of the Programme for the International Assessment of Adult Competencies (PIAAC). Therefore, adult and continuing education are starting to use theories of welfarestate regimes (Esping-Andersen, 1990) as a theoretical model to subsume single countries under one type of welfare-state regime. Markowitsch et al (2013) distinguish between social-democratic welfare states, conservative welfare states, familyoriented welfare states, liberal welfare states, and neo-liberal and neo-conservative welfare states (from a Euro- and Western-centric perspective). From a more global perspective, Saar, Ure, and Holford (2013) developed a 'typology of skill formation systems, which differentiates four global models: market model, corporatist model, development state model, and neo-market model. All typologies have in common that they subsume selected countries and adopt a macro-perspective. These typologies are very helpful for understanding and explaining similarities and differences on a macro level and understanding long-term developments. But the typologies are very limited in terms of explaining short-term developments and antagonisms on the meso or micro level of adult and continuing education (e.g. adult learning participation).

The Würzburg Winter School, by contrast, is focused on understanding multiple analytical levels (mega, macro, meso, micro) and also intends to compare issues on the meso and micro level. To that end, the two parts of the Winter School provide

two different models for comparison: a deductive, theory-oriented approach in the first part, and an inductive approach in the second part.

During the first part of the Winter School, the group works with educational models developed by Lima and Guimarães (2010): the democratic-emancipatory model, the modernisation and state control model, and the human resources management model. Studying these models gives the participants of the Winter School a shared terminology for comparison. Furthermore, the models serve as ideal types, which in practice typically only occur as mixed-models. Based on the models, participants present developments in their home countries and reflect on how they relate to the models. Furthermore, they learn about and discuss developments in adult and continuing education in the countries of the other participants. Through the presentation of regional or national developments during the Winter School, participants receive first insights into the situation in other countries, compare it with that in their home countries, and refer it back to a theoretical model. It gives participants initial comparative insights into similarities and differences and opens perspectives. This 'incomplete' comparative approach is what is called 'comparative perspectives' in this volume. The contribution of Lima, Guimarães, and Touma (in this volume) not only provides a rich example of these comparative perspectives but also takes the comparison one step further.

The second part of the Winter School features an inductive approach—based on the shared terminology developed in the first part. Participants in each group prepared country reports presenting the situation in their home countries. All comparative groups start with an introductory phase during which they work on the key terms. Once they have reached a shared terminology, country presentations follow, given by the participants based on their country reports. During the presentations, the group members started doing implicit comparisons and developing transnationally applicable comparative categories. After the country presentations, comparative categories were developed in more detail to make them more precise. Based on these developments, groups decided which categories to use for the ensuing comparison. The categories were tested by selecting information from each country for a side-by-side presentation (juxtaposition). Afterwards, the categories were further developed. Based on the finished juxtaposition, the groups worked to identify similarities and differences between the countries and worked on joint explanations for these similarities and differences. As these last two steps were very marginal in several groups during the Winter School, this volume allows for further elaboration on the interpretation of similarities and differences.

Beside its academic and analytical objectives, the Winter School also aims to promote peace: Bringing young people together for comparative research allows for starting a process of understanding international and intercultural phenomena. Comparisons in international groups provide new insights into other countries and into new aspects and variations of new models. They also facilitate a better and more detailed understanding of the situation in one's own home country. Furthermore, they give participants a sense of how difficult it is to compare situations in other countries. For promoting peace, another step is necessary: to understand in a cognitive, emotional, and social way the limitations of our understanding of our own and other phenomena. Ideally, this insight leads to an attitude of further questioning one's own understanding in an ongoing endeavour to working on deeper understanding. An ideal 'result' of the Winter School is to never have a final result, but to continue the never ending journey of personal efforts to try to understand each other. This also means searching for the things that link us to each other: to be aware of the always existing boundaries of our own understanding while developing an attitude of 'constantly trying'. In this way the approach of the Winter School goes beyond Charters and Hilton, because it doesn't only ask for explanations of similarities and differences but also cultivates a comparative attitude of students, which explicitly includes emotional and cognitive aspects of non-understanding.

Summer 2015—the time this volume is being finalised—is characterised by deep international crisis. We realise that internationalisation and globalisation not only pulls the world closer together, it also means that international conflicts of various kinds are coming closer: the world-wide refugee situation; political conflicts that also affect Europe, and the fiscal challenges within the Eurozone. These are just some examples from a European perspective. All these challenges ask for people who are willing and able to work further on understanding each other. This can be understood as a key foundation for peace development. The Würzburg Winter School aims to qualify young people to do comparisons in their academic discipline to be analytically equipped for working on deeper understanding.

An overview of the papers in this volume

The volume is roughly structured along the comparative groups.

The chapter 'Comparing policies in lifelong learning' consists of two papers. Lima, Guimarães, and Touma outline the theoretical and analytical approach that formed the basis of the first part of the Winter School. Based on this approach, the authors develop four categories with which to compare adult and continuing education in Portugal, Germany, and Sweden: political-administrative orientations;

political priorities, organisational, and administrative dimension; and main conceptual elements of public policies. For their analysis, they use the country reports of CONVINTEA VI. The analysis shows that all three public (educational) policy models are present in the three countries but to different degrees. Modernisation and social control policies can be observed in all country reports, but the increasing presence of a human-resource model is notable as well. The emancipatory model is much less present and mostly found in Sweden. Furthermore, the authors show the strong influence of European policies, which drive national policies in adult education and lifelong learning.

Singai, Gioli, Riemer, Regmi, Mastrokoukou and Singh take a European-South Asian perspective, comparing the development of the knowledge economy and demographic change in a transcontinental comparison. The paper focuses on the different demographic challenges in Europe and South Asia and the different influences of international organisations on national policies. Whereas the European Union is a strong influencing actor in European countries, UNESCO's policies in lifelong learning seem to be the main influence in South Asia. In Nepal, the influence of the World Bank is shown. It is the World Bank that puts lifelong learning on the national agenda of Nepal. The authors conclude that lifelong learning and the development of a knowledge economy have entered the agenda of all countries. Analysing the terminology in South Asia, one can even find EU influences.

The chapter 'Comparing professionalisation in adult and continuing education' brings together the papers of the comparative groups 'Training the Adult Education Trainers' and 'Academic Professionalisation in Adult and Continuing Education'. Both groups focus on people employed in the contexts of adult education. Liszt, Toko, and Yan focus on the questions: What is meant by 'adult education', and who are the key actors? For their comparison, they researched the European Union, India, and China. The interpretation shows that adult education has different meanings in the three contexts. Whereas the term *adult learning* became more and more important in the European Union, China has a strong focus on professional development for everyone. In India, by contrast, the authors found a strong emphasis on literacy education. Nevertheless, the authors identify a common focus on promoting lifelong learning as a 'new attitude of living' in all three contexts.

Boffo, Kaleja, Sharif-Ali, and Fernandes compare curricula of study programmes in adult education in Italy, Germany, and Portugal. They analyse challenges for developing a curriculum with regard to graduates' potential employment market. The authors conclude that a professional path of professionalisation in adult and continuing education is not available in all countries. Nevertheless, there are

initiatives for developing a joint European study programme in adult education. Although the traditions are different in each country, the authors conclude that the development of applicable knowledge and competences for adult educators through university programmes is a joint challenge. Keeping in mind the employment market for graduates also means being aware of the different legislative contexts.

In a second paper, Boffo, Kaleja, and Fernandes take a comparative look at the regulations and working conditions of trainers in adult education. The authors analyse the role of trainers in contributing to democracy, employability, and the economic and social development of a country, criteria in line with European policies. They outline the joint challenges on flexibility, low salaries, and working conditions faced by adult education trainers in all countries.

Semrau, Vieira, and Guida analyse university courses in adult education in Germany, Italy, and Portugal. The authors can show the influence of the Bologna process on the development of all study programmes. In Germany, there was a shift from the 'old' *Diplom* programmes to the bachelor's and master's programmes. In Portugal and Italy, it seems that the importance of adult education as an academic discipline began to improve. The authors could show that in an overall rough perspective, bachelor's programmes take a more general perspective on education, whereas master's programmes are more focused and profiled in adult and continuing education. They conclude that all programmes offer ways of linking academic knowledge to practice during the master's programmes, but that further developments are needed for the interconnection of academic knowledge and practice.

The chapter on 'Comparing participation in adult education' consists of one paper, which compares the situation in Europe and India. Europe is represented by Portugal, Italy, and Hungary. The paper shows common trends in Europe, such as rising participation rates in adult education and learning activities. India is also seeing rising participation rates in literacy. Besides the obvious difference that India concentrates on literacy and Europe on participation, the paper also shows differences between the European emphasis on participation or input and India's stronger focus on outcomes. Furthermore, the reasons given for participation and non-participations in each country indicate a focus on the individual in Europe and a more collective orientation in India.

The comparative group on quality provided two papers in the chapter 'Comparing quality management'. Hilbig, Thom, and Tursi compare quality management procedures in Italy and Germany. They show that quality management systems are mainly implemented in a top-down process by national and regional authorities. Furthermore, the authors stress that the influence of the European Union is

growing. They show that quality management for adult education means to 'fulfil in particular economic requirements', referring to a German model which pays strong attention to the learning process. The authors conclude that quality in adult education is not only produced by management systems, but that the trainer has a strong influence on quality in adult education as well.

Everett and Müller compare two quality management models in the United States and Germany. They conclude that no overarching seal of quality exists in either context, and that the general process of the two models (LQW in Germany, regional accreditation in the U.S.) is quite similar. But there are also differences: Whereas regional accreditation in the U.S. is focused on higher education institutions (not on individual degree programmes), LQW in Germany is mainly used in adult and continuing education outside higher education.

The chapter 'Comparing guidance and counselling in lifelong learning' consists of two papers. Tomei, Carp, and Kröner compare guidance and counselling in higher education in Germany and Italy. As a common trend, they identify an increasing demand of the employment market for career service guidance and counselling in higher education. The authors see the Bologna process as a milestone for implementing career services in higher education. Moreover, the employability approach is an overarching theme for career service activities. However, the framework of these services varies in terms of strength and adaption between the countries, as well as concerning the role and the interplay between higher education and the labour market.

Grasso, Tomei, Balasz, Goswami, and da Silva Ribas analyse processes, methods, and activities of guidance and counselling in Hungary, India, Italy, and Portugal. Based on the different understandings and practices in guidance and counselling, the group analyses some common aspects in all countries, which are linked to coping with the needs in the respective contexts. Guidance and counselling is strongly linked with lifelong learning strategies and the 'wellness of nations and people'. The paper also shows the strong influence of the European Union on non-EU countries.

The volume ends with a chapter called 'Country reports', which give an insight into some outstanding country reports provided by participants of the Winter School. Nicoletta Toumei presents the tutorship and adult guidance tool in Tuscany. Shalini Singh provides an overview of lifelong learning strategies in India in the context of global demographic challenges and inclusive developments in India. Kapil Dev Regmi shows an overview of adult literacy and lifelong learning policies in Nepal by connecting it to international policies.

Overall comparison

Like the bibliometric analysis in adult education, this book also presents a strong representation of female fellows in adult and continuing education. Likewise, topics such as systems and policies and professional acting—named by Käpplinger (2015) as frequent research topics—can be found in this book. The question of adult learning can be found in the group on participation in adult learning and education.

The overall comparison shows a strong influence of European policies in the national and regional context of adult and lifelong learning. Although the European Union is formally prohibited from harmonize the education systems of its member states, the European policy on lifelong learning became strongly relevant in all European contexts. Despite the highly critical discourse on this influence, European policies in lifelong learning have generated a shared terminology in academic contexts, allowing academic experts in adult and lifelong learning to work, develop, dispute, and hesitate together. This shared terminology became especially obvious during the Winter School when comparing countries in Asia. Several papers highlight the influence of the European Union on educational policies in South-(East) Asia. In can be summarised that European policies in lifelong learning have an influence far beyond the EU although formally they only have an advisory function, not a regulatory mandate! However, this influence could not be observed in the U.S.

The view from outside of Europe—represented during the Winter School by India in particular—not only contributes to identifying a kind of European identity in the context of adult and lifelong learning. It also shows the weaker presence of UNESCO's educational policies in European states. The insights into the Indian situation allow us to realise the influence of UNESCO's educational policies (e.g. Education for all). The example of Nepal also gave an insight into the influence of the World Bank's educational policies in developing countries (Regmi in this volume). The authors from these countries summarise a two-fold effect of these international actors: On the one hand, they push national policies towards adult and lifelong learning. On the other hand, they seem to lack sensitivity regarding existing developments to promote adult and lifelong learning. This would be important, however, to match policies with specific cultural contexts and traditions. This is especially important when policies from so-called Western contexts are transferred to the Asian context: The highly individualised, post-modern lifelong learning policies centred on individual freedom and self-actualisation frequently ignore group- and family needs in Asian countries. There is a big danger that individualised concepts disregard collective needs in Asian contexts. It is very likely that an individualised kind of education that doesn't include collective aspirations will be a misleading approach–because it hurts central motives.

Despite all the different contexts, the comparisons also show similarities in adult education and lifelong learning in all the countries studied: All over the world, adult literacy is understood as central requirement for democratic developments. Adult education acts as starting point for making societies literate. The literacy experiences of parents can serve as a starting point for valuing education for children. Without adult education, interventions in primary education will surely be limited.

A central challenge for getting people to participate in adult education and lifelong learning is to make it match their needs and contexts. This seems to be true all over the world, underlining the analysis of contexts as a central issue in adult education. Singh (in this volume) refers to the skill development initiative in India, which customises adult literacy programmes to people's needs. Thereby, adult education centres create links between the educational, financial, and social needs of adults. The employment market also forms an important context—in European countries as well. The papers in this volume show that adult education can contribute to the development of societies only by a sensitive analysis of people's situation, contexts, and needs. The specific living conditions have to be the starting point for societal developments.

Although the influence of international organisations varies in the countries studied here, it can be said that there is a strong influence of international organisations in most countries. More research would be necessary for the U.S. to find out if this is true in this context, too. For the other countries, it can be stated that we live more and more in a shared adult education and lifelong learning policy context, which affects national and regional autonomy in adult education. Adult education cannot be understood as a purely regional activity. Moreover, the analysis of local adult education and lifelong learning needs reveals their connectedness to international policies. This is exactly what participants of the Winter School did during their visits of local adult education providers.

In terms of Lima and Guimarães's educational models, the influence of the market—and hence a resources management model—can surely be observed in the European Union. Maybe there is potential that UNESCO will provide a stronger modernisation and state control model of lifelong learning, which will also be promoted in specific modifications by national governments. Is it the role of adult education, as an academic discipline, to promote a democratic-emancipatory model? With regard to the Asian context, collective needs also have to be respected for an international approach towards adult education and lifelong learning.

Finally, I'd like to express my sincere thanks to several people and contexts who made the 2015 Winter School and this volume possible: First of all, thank you very much to all colleagues from the partner universities. Most of these colleagues not only taught in the Winter School, they also motivated their students to participate, prepared them in tutorials, and guided their international group in the preparation of the country reports. Furthermore, they supported their young colleagues as mentors and co-authors in the contributions to this volume, which involved strong and intensive efforts. My further thanks go to all participants of the Winter School. All participants engaged in intensive preparations and were actively involved in the school. All of them contributed to each other's learning process. Many of the participants agreed to contribute to this volume, often writing their first academic paper.

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