30 YEARS OF RESEARCH ON ADULT EDUCATION, 30 YEARS OF ESREA

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Introduction

The European society for research on the education of adults (ESREA) was created late in 1991 in a time when Europe was drastically changing. Former states controlled by the Soviet Union had freed themselves. The Berlin wall had been torn down. War was raging in what was then Yugoslavia. The 1980s in Western Europe had also been a time of dramatic political, economic and cultural change with the shift to what is now called neoliberalism and globalization. Adult education in those days, as often, played an important role in many people's lives, trying to make sense of these changes. And researchers interested in adult education in Europe were, through the initiative of ESREA, offered a space to meet colleagues from all across Europe.

30 years later Europe has witnessed an extended financial crisis and the so-called migration 'crisis' without really being able to overcome the underlying causes. There is – fortunately – deep popular concern about precarity and growing inequality. But there is also a growing distrust in institutions and right-wing extremist parties have gained momentum across many countries in Europe. From 2020 and still, the spread of Covid-19 has posed Europe, and the entire world, one of the greatest challenges in modern times.

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The war raging on European soil in Ukraine poses yet another great challenge. Once again, adult education may have an important role to play, supporting people in different strands of life, and in handling changing life circumstances.

The exact date is debatable and different between countries, but mainly in the 1960s and 1970s a new field of research emerged in the social sciences, in line with the growing recognition of adult education as a field of practice and a domain of policy making. In some cases, it was a kind of applied psychology aimed at improving teaching practices. In other contexts, it became codified as a new discipline dealing with adult education called andragogy (Knowles, 1980; Savićević, 1999). The scholarly work then predominantly focused on the history and ideas of adult education in the context of social movements and local communities, such as cultural associations, workers´ movements, folk high schools, etc. Adult education gradually gained new societal significance, influencing the international policy agendas, while taking up positions in line with UNESCO and the Council of Europe, and promoting the cause of enlightenment and the extension of democracy (Rubenson, 1996; Salling Olesen, 2006). At a later stage, new areas of education and training popped up as a response to societal needs and new cultural initiatives engendered diverging fields of practice – community education, popular/cultural education, further and higher education, vocational training and workplace learning. Much of this research was R&D, applied research supporting and evaluating labour market and social intervention. ESREA included these intellectual strands but also introduced new types of research emerging from the field of practice and in close connection with societal issues. Sometimes such research may have been parochial and limited by short-range interests and limited outlook. But most of it engaged in social change, gender issues and similar broad political issues, with a generally critical view of societal environments.

The neo-liberal dominance in the overall political climate from the 1990's onwards has privileged general policy agendas that prioritized concepts and practices of lifelong learning, thereby increasingly subordinating adult and continuing education to pressures of economic competitiveness, to labour market demands and to a narrow-minded concept of competence development (Nicoll & Salling Olesen, 2013). As the field of adult education and training has broadened and diversified and was no longer primarily based on social movements and classical popular/liberal adult education, the research field also developed more independently, recruiting new cohorts of researchers without any background in adult education practices, and drawing both on new research paradigms and the traditional discipline of education. As a consequence, practice and research have moved apart. Today it is also difficult to overview or define a practice field of adult and continuing education.

Alongside the rapid growth of the whole university sector, the influx of a new type of students, in combination with their political radicalization in the 1960s and 1970s, provoked an increased use of hermeneutic, phenomenological and critical perspectives. This development also paved the way for qualitative research methods that did not have much legitimacy and scientific status right from the start (see e.g. Larsson, 2006). In terms of methodologies, qualitative methods have long been dominant: biography and life history focusing on the adult learner, fieldwork and ethnographic studies focusing on cultural milieus but also institutions, and critical discourse analysis unveiling power relations (see e.g. Fejes & Nylander, 2019). Meanwhile, the research field of adult (and continuing) education and adult learning has developed into a rather multidisciplinary domain of the social sciences. At the same time also the institutional frameworks have developed in diverse ways. In several countries existing institutional seats of adult education research and scholarship have been integrated into traditional (school)

pedagogy institutions, or the other way round in organization and management institutions.

The theoretical interests and methodological expertise that has come to dominate adult education research since its emergence, connect with wider trends in society and within the social sciences and humanities at large. Much of what has dominated this field in recent times seems related to broader currents in the post-war era. The political importance of the lifelong learning agenda has now also materialized in research that – similarly to the education research – is focused on large scale surveillance and monitoring of policy initiatives (see e.g. OECD, 2016; UNESCO, 2016).

The debates about the sovereign epistemological status of the field have almost disappeared. Previously there were discussions and debates on the status of the field, where some argued that adult education should develop its own theories and methodologies with the concept of 'andragogy' as an expression of that ambition (Knowles, 1980; Pöggeler, 1957). However, today this discussion might seem rather obsolete as many scholars suggest that the field is inherently interdisciplinary and pluralistic (see e.g. Fejes & Salling Olesen, 2010; Hake, 1992; Rubenson, 2000), while others stick to the idea of andragogy (see e.g. Popović & Reischmann, 2017).

ESREA becomes 30 years old

Against this backdrop, ESREA has become 30 years old. Since its birth, the Society has evolved into an important place for researchers, not only across Europe, but also from the world beyond, to meet, discuss and debate adult education research as well as practice. Each three years ESREA hosts a big triennial research conference, which has been analyzed in terms of who participates, what kind of research is being conducted as well as based on what theories and methodologies (e.g. Käpplinger, 2015). Today, twelve research networks are active under the ESREA umbrella. Network participants meet at conferences, and exchange result findings through papers, presentations, books and journal articles. The networks deal with a wide variety of topics related to adult education practices such as gender, work, globalization, migration, access to education, life histories, professional development, transformative learning, histories, policies, ageing and democratic citizenship. Through their activities the networks have further developed the scene of adult education research, contributed to the development and refinement of research methodologies, stimulated young researchers to find inspiration in international contacts and helped to improve the quality of adult education research. They have inscribed themselves in dominant research traditions but have definitely also contributed to the renewal of theoretical approaches and methodologies. Part of this story has already been told a few years ago (Nicoll, Biesta, & Morgan-Klein, 2014). It presents an open range of diverse contradictory developments after the millennium.

ESREA has also created two main publication outlets, both as open access to make research available freely to anyone who can access the internet: the journal RELA and a book series. RELA has since its establishment in 2010 established itself as one of the main peer-reviewed adult education journals in Europe currently publishing three issues a year. The book series is published by Brill/Sense, and contributions are mainly based on revised papers that have been presented at ESREA conferences.

ESREA has thus done a lot in its 30 years (now 31 years) of existence. RELA would like to celebrate the anniversary of ESREA by dedicating this issue to ESREA and all the work done by those involved in the organization. The issue contains six articles submitted

during the anniversary year that together provide a good example of what kind of research is being conducted in the field.

Introducing the articles

In the first paper *Barry Hake* reports on historical research revisiting the birth of UNESCOs take on the concept of lifelong education, a topic consistently addressed and even more frequently referenced. The author examines the nature of the Faure Report in a broad political and cultural context while focusing on some lesser-known facts. The paper is polemical in nature, offering an alternative to the usual perspective. Among other things, it aims to demonstrate that some problematic features oft-associated with the lifelong learning concept were already characteristic of the Faure Report – for instance, its technocratic and economistic orientation.

In the second paper *Halliki Põlda, Katrin Karu and Riina Reinsalu* focus on an important aspect of the wider field of adult education and learning – non-formal education. Based on metaphor analysis of interviews with participants in non-formal education in Estonia they argue that such a form of education provides space for purposefulness, collaboration, and tolerance towards difference.

In the third paper *Clara Kuhlen and Regina Egetenmeyer* provide an example of a research area that is common among adult education researchers in Germany – program planning. They specifically focus on program planners' reasoning regarding categories of distinction in relation to determining target groups of programs. The authors argue for a sensitivity towards categorization as such work might produce what it aims not to – inequality.

In the fourth paper *Jerald Hodonga, Manto Sylvia Ramaligela and Moses Makgato* address the general challenge of how schools equip school leavers with the necessary skills to access the labour market. More specifically they focus on the context of Zimbabwe and how school leavers there, who in turn migrate to Botswana, manage the labour market. Based on a survey and interviews they conclude that the school leavers' level of technical skills was sufficient to get low qualified jobs. However, the skills were too low to obtain more qualified jobs and a residence permit.

In the fifth paper, *Jan Kalenda and Ilona Kočvarová* join the long-term debate on motivations for and barriers to participating in adult education. It provides a clear overview of an important portion of the debate to date, following up on both older, classic authors and the most recent research. It puts the category of nonparticipants in the spotlight and offers a typology thereof. Indeed, since researchers have thus far focused on participants capable of overcoming barriers, nonparticipants can be considered a "neglected species" sui generis. The paper relies on qualitative data obtained through research on the Czech population. Given the nature of the question at hand, the paper provides an interesting contribution to the international debate.

In the sixth and last paper *Antonella Cuppari* provide a piece of autoethnographic reflection – a methodology that has been quite central to the biographical research network of ESREA. In this piece the author focus on a cooperative enquiry involving social workers, volunteers and family members of people with intellectual disabilities in Northern Italy.

We hope that the articles will stimulate more work by scholars in the field of adult education and learning as well as on the past, the present and the future of ESREA.

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Mapping our way out? Critical reflections on historical research and the 1972 Faure report

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Abstract

Contributions to the literature have postulated an historical shift in policy narratives from the Faure report's formulation of "lifelong education" for UNESCO in 1972 to a focus on "lifelong learning" since the mid-1990s. It has also been argued that the policy narrative articulated by de-schoolers in the early 1970s was incorporated in the Faure report. This paper critically examines the empirical foundations for such arguments and is based on a re-reading of the policy repertoire articulated by Faure's report together with an analysis of the de-schoolers' reception of the report in the early 1970s. Based upon a re-reading of primary texts and secondary sources from the 1970s, the analysis demonstrates that these widely accepted arguments constitute a problematic interpretation of the historical relationships between the key policy narratives in the 1970s. The conclusions identify a number of significant areas for further empirical research regarding the historical relationships between first generation policy narratives.

Keywords: Cultural practice, de-schooling, lifelong education, lifelong learning, policy repertoire

'A large part of what passes for adult education theory is an extraordinary combination of sectarianism, special pleading, mythmaking and mortmain' (Williams, 1959, p. 750)

Introduction

Revisiting the policy narratives of the 1970s is now a well-established habitus among those with an interest in changes in policy prescriptions from the perspective of lifelong education in the 1970s to the current age of lifelong learning (Pineau, 1977; Rozychi,

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1987; Wain, 1989; Guigou, 1977, 1992; Field, 2001, 2012; Medel-Añonuevo, Ohsako & Mauch, 2001; Tuijnman & Boström, 2002; Forquin, 2004; Schütze, 2006; Billett, 2010; Lee & Friedrich, 2011; Haddat & Aubin, 2013; Jarvis, 2014; Elfert, 2018). When returning to the policy landscapes of the 1970s, "lifelong education" is regularly compared with other policy concepts such as "recurrent education", "éducation permanente", "permanent education", and "paid educational leave", but less frequently with "de-schooling" society (Alenen, 1982; Duke, 1982; Gelpi, 1984, 1994; Giere, 1994; Boshier, 1998; Istance, Schuetze & Schuller, 2002; Hager, 2011; Laot, 2009; Zaldívar, 2011, 2015; Bartlett & Schugurensky, 2020). A major feature of this discourse, however, comprises the identification of a major paradigm shift from lifelong "education" to lifelong "learning".

Since the mid-1990s, research on adult education as a lifelong process has been characterised by a recurrent, if not a permanent, focus on the widely shared diagnosis of an epoch-shaping shift from narratives addressing "lifelong education" to a preoccupation with "lifelong learning" (Barros, 2012; Biesta, 2012; Boshier, 2012 Milana, 2012; Elfert, 2015, 2018, 2019; Fejes & Nylander, 2019). Mapping these shifting policy paradigms is necessary according to Rubenson (1982, 2006, 2009), who postulates that the 1970s constituted the first of two "generations" of policy development. In similar vein, Hager (2011) refers to first and second "waves" of policy concepts addressing lifelong education and lifelong learning. Others have argued that these generations were marked by significant shifts in "policy vocabularies" from lifelong "education" in the 1970s to lifelong "learning" in the 1990s (Barros, 2012; Milana, 2012). In their contribution to the literature on mapping the field, Fejes and Nylander (2019, p. 3), for example, argue that 'The shift from focusing on education to speaking about learning is important to address in research, because it marks out a new way of conceptualising the education and learning of adults'.

In this context, the 1972 Faure report *Learning to be: the world of education today and tomorrow* (Faure, Herrera, Kaddoura, Lopès, Pétrovski, Rahnena & Ward, 1972), serves as a common point of reference for the entire field of research known as "adult education". Furthermore, the majority of studies contributing to the adult education canon specifically argue that UNESCO's policy vocabulary addressing "lifelong education" *á la Faure* incorporated the critical policy vocabulary of "de-schooling" society as this was voiced by its leading proponents Illich (1970) and Reimer (1971). From a comparative historical perspective, this paper addresses the postulated post-war shift in policy preoccupations from lifelong "education" in the 1970s to lifelong "learning" in the mid-1990s. It seeks to offer a critical historiography of the policy formation process surrounding the production and reception of the Faure report as a UNESCO policy document in 1972. Exploring recent contributions to the literature, it constitutes a critical examination of dominant representations of the Faure report regarding the relationships between lifelong education and de-schooling in the 1970s. It questions the empirical validity of widely accepted interpretations of the historical reception of this particular report.

Revisiting the 1972 Faure report: Policy vocabularies, narratives, and repertoires

Examining the historiography of policy formation since the 1950s, Hake argues that narrative policy analysis offers a potentially fruitful theoretical perspective for research addressing historical transformations of policy vocabularies in relation to the social organisation of communication and learning (Hake 2005; 2011; 2017; 2018; 2019; 2021). For the purposes of comparative historical research, policy narratives can be operationalised as '...ideological representations of arguments advocating the

redistribution of educational opportunity structures throughout life' (Hake, 2018, p. 783). As social-political phenomena, these policy narratives are historically embedded in the cultural practices of a diverse range of policy actors. These policy actors include international organisations, trans-national polities, governments, ministries, parliaments, political parties, social partners, and educational organisations, but also involve more diffuse policy-relevant actors including the social partners, interest groups, social movements, grass-roots activists, and public intellectuals. Narrative policy analysis examines these narratives by means of empirical research that investigates historical manifestations of these collective "policy repertoires" in terms of their articulation of specific policy strategies, measures, and specific instruments for redistributing learning opportunities. Research subsequently involves description and analysis of partisan policy repertoires that articulate specific policy proposals in reports, documents, submissions of evidence, books, pamphlets, posters, social messaging, protests, demonstrations, and occupation of public space. These cultural repertoires are historically manifested in partisan socio-political struggles concerning the redistribution of learning opportunities over the life course of social groups and individuals. Historical study and analysis of social-political of ideologies as collective structures of argumentation can contribute to the identification of shifts and breaks in the social organisation of "hegemonic", "dominant", "official", "alternative", and "oppositional" cultural repertoires (Williams, 1966, 1981; Jones, 2006; McGuigan, 2019).

From a comparative historical perspective, this paper explores contributions to the literature that articulate the dominant reading of the 1972 Faure report as the "iconic" historical marker of the postulated post-war shift in policy preoccupations from lifelong "education" in the 1970s to lifelong "learning" since the 1990s. It does not seek to offer an in-depth reconstruction of the socio-historical origins, reception, and implementation of the policy repertoires associated with "lifelong education" and "de-schooling". Its more limited and specific purpose is to investigate the empirical basis of recent contributions to the literature with reference to the Faure report's incorporation of de-schooling. As such, this article constitutes a critical examination of the adult education literature regarding representations of the Faure report in relation to de-schooling in the early 1970s.

The following section comprises a review of recent contributions to the literature that propagate the diagnosis of a shift from lifelong education in the 1970s to lifelong learning since the mid-1990s. Section three revisits the 1972 Faure report in order to examine arguments that its policy repertoire incorporated the radical criticism of institutional education as articulated by the de-schoolers. In section four, the de-schoolers' own reception and subsequent critique of Faure's policy repertoire is examined. Section five addresses historical lacunas in the recent literature and suggests priorities for further historical research. This demands a return to primary sources, particularly the text of Faure report itself, together with further empirical research in significant areas. In conclusion, it is argued that critical re-readings of the Faure report were, and remain, available.

Reconstructing Faure's lifelong education narrative

Regarding the two-generations thesis, Milana (2012, p. 110-111) argues, 'The first of these [generations], from the 1960s to the 1980s, was strongly bound to the emerging notion of "lifelong education" as developed by UNESCO.' In the words of Biesta (2005, p. 55), 'One of the most remarkable changes that has taken place over the past two decades in the way in which we speak about [….] education, is the rise of the concept of "learning" and the

subsequent decline of the concept of "education'". Likewise, Fejes (2013, p. 99), asserts that 'During the 1990s, we can see how the concept of lifelong education was replaced by lifelong learning within the policy texts.' In similar vein, Barros (2012, p. 120). observes, 'There has been a shift in paradigms from lifelong education, where the concept of education is seen as a collective entity and a state obligation, to lifelong learning, where the concept of learning is seen as an individual entity and a personal duty'.

In relation to such arguments, Faure's 1972 report has been widely recognised as 'the canonical text of the lifelong education movement' (Wain, 2001, p. 184) of the 1970s. According to Milana (2012, p. 109), it 'represented not only a universal principle, but a concrete step towards a democratisation process in education that should lead to the improvement of the quality of life for all'. Likewise, Biesta (2006, p. 171) remarks that Faure's report formulated 'lifelong education in terms of solidarity, democracy and "the complete fulfilment of man"'. For some, Faure formulated lifelong education as a "humanist project" embracing a 'view of education in its totality as a socio-political and cultural utopia for a more humane society' (Wain, 2001, p. 184). As Fejes (2013, p. 99) notes, 'In the report, we can see how lifelong education is related to a positive humanistic notion of progress and personal development'. In similar vein, Field (2001, p. 6) postulates that 'the Faure report was a turning point. Its essential humanistic concern was with achieving the "fulfilment of man" through flexible organization of the different stages of education'.

Regarding the question of shifting policy vocabularies, Boshier (1998, p. 5) remarks that '…if lifelong education was an instrument for democracy, lifelong learning is almost entirely preoccupied with the cash register'. Likewise, Biesta (2006, p. 172) notes that 'In about three decades, then, the discourse of lifelong learning seems to have shifted from "learning to be" to "learning to be productive and employable"'. This paradigmatic shift from "education" to "learning" has been explained in terms of 'learning to earn' (Medel-Añonuevo et al., 2001, p. 1), and the neo-liberal 'mantra of lifelong learning' (Milana, 2012, p. 105), involving 'adaptability and employability' (Fejes, 2013, p. 104). According to Boshier (2012, p. 701), the neo-liberal tendency of 'flying a flag of convenience signals the fact that educational planning has drifted far from the utopian yearnings of the 1970s. […] Since the 1990s, lifelong education systems have collapsed and mostly been replaced by ad hoc and disconnected manifestations of lifelong learning'. Similarly, Lopez (2014, p. 44) suggests that 'Faure sought to defend an education aimed at the emancipation of the individual and his fulfilment as a human being, and yet, in the decades that followed, such vision has succumbed to the dictates of the neo-liberal state'. Referring to Faure's "utopian vision", Boshier (2012, p. 711) posits that 'By the 1990s, utopian, festive and democratic notions of lifelong education had been replaced by individualized and technologically-mediated notions of learning'. Biesta (2006, p. 171) concludes that *Learning to be* was a remarkable historical document because the views it expressed 'stand in such sharp contrast to the policies and practices that make up the world of lifelong learning today'. Reiterating such interpretations, Elfert (2015, p. 88) posits that the Faure report represents 'a political utopia at odds with current utilitarian policy repertoires'. As Biesta (2021, p. 14) argues, '…a discourse of education has been replaced by a discourse of learning, thus making education frst and foremost an individual matter – something for individual lifelong learners to take responsibility for – and also making it increasingly a formal matter – something that is about adjustment and adaptation to whatever environment presents itself'.

Such studies have constructed an interpretation of the two-generation thesis based on a paradigm shift from lifelong "education" to lifelong "learning". However, as Field (2001, p. 12) points out 'It is tempting to conclude, as some have done, that the semantic

shift from "lifelong education" to "lifelong learning" marks a sharp turn towards vocationalism and away from emancipation'. Nevertheless, within this interpretative framework, some subsequently proceed to argue that the Faure Commission's report incorporated the radical de-schooling repertoire of the late 1960s and early 1970s. This particular discursive practice will be subjected to critical scrutiny in the following sections.

Ambiguous architectures: "Lifelong education" embraces "de-schooling"?

Many proponents of Faure's report articulate its "radical" significance on the grounds that it incorporated the critique of institutionalised education articulated by anarchistic-utopians, neo-Marxists, 1968 activists, and de-schoolers. Regarding shifting vocabularies, Boshier (1998, p. 29) postulates that 'There has been a shift from a neo-Marxist or anarchistic-Utopian template' embedded in the Faure report to the hegemonic neo-liberal agenda of lifelong learning in the 21st. Referring to May 1968, Lopez (2014, p. 44) posits that 'The Faure report […] seems to have finally embodied many of the concerns and ideals that had paraded down the streets of Paris in 1968'. Even Faure himself has been identified as a representative of the first-generation of 'anarchistic-utopianism and neo-Marxian perspectives' (Boshier, 1998, p. 9). In more general terms, Lee and Friedrich (2011, p. 157) argue that 'Inspired by radical social democrats such as Freire and Illich, the Faure Report mentioned the pedagogical meanings of de-schooling and de-institutionalisation in its critique of conventional educational system'. Boshier (1998; 2004; 2012) persistently argues that Faure was influenced by critics of institutional schooling, including Freire, Goodman, Holt, Illich, Ohlgher, Reimer, and Tough. Along similar lines, Lee and Friedrich (2011, p. 157) state that 'this accommodation of radicalist voices is the most distinguishing feature of the Faure report.' Milana (2012, p. 109) also argues that the Faure's report was remarkable because it 'incorporated radical stands (de-schooling, de-institutionalisation)'. More recently, Elfert (2019, p. 20) concludes that 'The broader significance of the *Faure report* lies in it being an expression of a movement driven by socialist and social democratic forces pushing for democratisation and the regulation of capitalism in the 1960s and early 1970s'.

If Faure's report was, as many have argued (Field, 2001; Wain, 2004; Lee & Friedrich, 2011; Elfert, 2015), the humanistic child of its times, the Faure Commission clearly had problems in making friends. The Commission's introduction referred to four categories of "major trends" in educational development in the volatile worldwide policy environment of the early 1970s. These included, firstly, "educational reformers" involved in 'reforming and reorganising existing education structures and modernising teaching methods' (Faure at al., 1972, p. 19). Secondly, it identified "structural transformations", as 'In countries which more or less recently have gone through social and political upheavals, events have often led to profound structural changes in the educational world, affecting the student base, access to education at various levels, curricula revision and, although to a lesser extent, modernisation of methods' (Faure at al., 1972, p. 19). Their third category referred to "radical criticism" as expressed by proponents of de-schooling of society. Fourthly, the report referred to student and worker activists associated with the events of 1968 in terms of "dissent" (Faure at al., 1972, p. 20).

With its third category, "radical criticism", Faure's report referred to a very mixed bunch of so-called anarchistic-utopian, de-schooling, and neo-Marxist critics of conventional education. Well-known critics, including Freire, Goodman, Illich and Reimer, had been invited to submit papers as evidence to the Commission. While Illich's

paper, number 38, was entitled '*On the Necessity to De-school Society'*, papers by Freire, Goodman and Reimer, papers 36, 37 and 39, carried the emblematic common title of '*Unusual Ideas about Education*'. Among the 81 documents prepared for the Commission, as recorded in appendix 5, these papers were placed together in *Section B: Opinions*. In the text of the Faure report, Freire was referred to in three footnotes on pages 75 and 139. While Elfert (2018) posits that Illich was cited several times, these constituted, in fact, two minor footnotes on pages 20 and 21. It remains uncertain as to whether Commission members visited Illich in Mexico to as suggested by the reference in footnote 5 on page 21 to an interview him. Zaldívar (2011, p. 64) notes that the outspoken Russian member of the Commission later referred to Illich as unoriginal and an ignoramus (Petrovsky, 1976, pp. 57-61).

In his Preface, Faure articulated the Commission's position regarding aspirations to de-school society as: 'Views of this kind are usually presented as progressive and even revolutionary, but if they were put into practice on any scale, their effects would certainly be of a reactionary nature' (Faure et al., 1972, p. xxxii). In the report itself, de-schoolers were described as 'proponents of "deinstitutionalising" education and "de-schooling" society' (Faure et al., 1972, p. 20). The Commission argued that 'Such theses, which as yet have no experimental basis, accordingly remain intellectual speculation' (Faure et al., 1972, p. 20). The de-schoolers arguments were regarded as 'grounded on an outright condemnation of "institutionalised" education and lead either to intermediary formulae or radical plans for a total "de-schooling" of society' (Faure et al., 1972, p. 20). De-schoolers were viewed as supporters of 'this extreme thesis' and 'these novel theories' (Faure et al., 1972, p. 21). Distancing itself from these critics, Faure's Commission, and UNESCO, did not seriously question the role of formal educational institutions in relation to the broader landscape of what was then widely recognised as "out-of-school" learning. Rene Maheu, Director-General of UNESCO, referring indirectly to Illich, remarked: 'If the report sometimes evinces sympathy for what might be called the "libertarian myth" in education, the fact remains that the "de-schooling" theory is expressly rejected as Utopian' (Maheu, 1973, p. 5). Rather than embracing the radical repertoire to de-school society, Faure, in his preamble to his Commission's report, emphatically stated that '…schools, that is to say establishments devised to dispense education systematically to the rising generations, are now and will remain in the future…the decisive factor in training men to contribute to the development of society, to play an active part in life, of men properly prepared for work' (Faure et al., 1972, p. xxxii). Although recent contributions reiterate arguments that Faure's report voiced the radical de-schooling repertoire, the report itself was fundamentally dismissive of contemporary practices associated with de-schooling. As such, it was itself not fundamentally critical of pedagogic work of formal education institutions (Finger & Asún, 2001; Forquin, 2002; Grace & Rocco, 2009; Zaldívar, 2011; 2015).

Given the vicissitudes of UNESCO politics in the early 1970s, however, Faure's report did not fare well in the short term. Attended for the first time by ministers of education, civil servants, and administrators, rather than academic adult educators and practitioners, the third international conference on adult education in Tokyo, 23 July to 7 August 1972, confirmed the vital contribution of lifelong education in implementing the "learning society", but it focused primarily on policy issues regarding adult literacy and economic development. Ignoring de-schooling, delegates expressed concern that Faure's proposals for alternating education and work subordinated learning to the exigencies of economic productivity, which sounded to them very much like OECD's ongoing embrace of recurrent education for lifelong "learning" (OECD, 1973). UNESCO delegates were reassured that this danger could be averted when lifelong education involved not only

updating of occupational knowledge and skills but also involved continuing personal development. Nonetheless, as Lowe's (1975, p. 215) report on UNESCO's policymaking concluded, 'There seems little doubt that many governments are committed, however haltingly, to facing up to the operational implications of trying to make educational opportunities available on a recurrent basis, especially with respect to occupational training'.

UNESCO's 1972 general conference, 17 October to 21 November 1972, approved a resolution that 'lifelong education should become the master concept for educational policies in the years to come' (UNESCO, 1973, p. 19). Regarding the Faure report, however, the conference also agreed that 'the report is not an official document of UNESCO, expressing the organisation's policy, but is the report of seven independent experts, published by UNESCO as an important contribution to world-wide discussion on educational development' (UNESCO, 1973, p. 19). Therefore, as the erstwhile 'magnificent seven' (Bengtsson, Berg, Gras, Hake, Hecquet, Lister & Zimmer, 1975, p. 122), rode off into the policy sunset of a doomed concept, while lifelong learning was already emerging from UNESCO shadows as 'lifelong education and learning', and was enshrined as such by the 1976 Nairobi recommendation on adult education (UNESCO, 1976, p. 2).

Lifelong education as "permanent inadequacy"?

Faure's lifelong education policy narrative not only encountered scepticism, or was simply ignored, in national and international policy circles (Simmons, 1973), it's ambiguous policy repertoire encountered critique from many academics (Bengtsson et al., 1975), while it was vigorously found wanting particularly by leading proponents of de-schooling. John Ohliger, referred to by Boshier (2004) as one of the key north American anarchistic utopians in adult education, regarded Faure's report as 'just another example of international bureaucratise, although in places the book has a haunting quality strangely akin to a tale of unrequited love' (Ohliger, 1974, p. 47). Regarding Faure's view that 'The normal culmination of the educational process is adult education' (Faure, 1972 p. 204), Ohliger commented dryly 'much more adult education was the only basic reform the report recommended' (Ohliger, 1974, p. 52). Voicing neo-Marxist critique, Carnoy (1974, p. 54) argued that Faure took 'one step forwards and two steps back in thinking about the crisis in education'. Critical of Faure's core assumption that science and technology, particularly its expectations concerning cybernetics, could solve social and educational problems, Carnoy (1974, p. 58), called for a 'defensive education', especially in developing nations, that demanded critical political consciousness and social action as effective strategies to resolve social and educational problems alike.

These radical critics argued that Faure's policy repertoire would extend the compulsory nature of schooling into adulthood. Totalitarian tendencies associated with lifelong education were identified including Faure's argument that 'School education must be regarded not as the end but as the fundamental component of educational activity, which includes both institutionalised and out-of-school education […]. Briefly, education must be conceived of as an existential continuum as long as life' (Faure et al. 1972, p. 233). Ohliger (1974, p. 56) remarked, 'If I must be oppressed, I don't want to be oppressed by educators. Can you imagine what it would be like with educators, such as the authors of this report, running our lives in a "learning society"'. While Milana (2012, p. 111) argues that the Faure report was significant because 'lifelong education identifies education with life', critics at the time regarded lifelong education as 'a widely dispersed

social process that threatened to engulf all social life outside of schools and would guarantee permanent inadequacy' (Ohliger, 1974, p. 54). A contributor to the Council of Europe's work on permanent education, Herman Frese, warned that 'lifelong education would reinforce the established social order, rightly or wrongly; controlling and manipulating the destiny of whole populations' (Frese, 1972, p. 11). At a time when distance education was embracing "open" learning on a broad front, he expressed reservations about Faure's ambitions for using mass media, particularly television, to expand educational provision, when this would involve neo-liberal technocratic control, emergence of commercial interests in the educational marketplace, and monopolies in producing learning materials.

Most telling, however, was the Cuernavaca Manifesto *The Price of Lifelong Education* (Cidoc, 1974). Responding to Faure's report, twenty-five public intellectuals from 14 countries met at the Centro Intercultural de Documentación, Cuernavaca, Mexico, 22 July-16 August 1974, to discuss a report entitled *Present trends towards lifelong education* (Guigou, 1975). Signatories of this 'truly disparaging and inflammatory attack on the proponents of lifelong education' (Further, 1977, p. 16) on the Faure report comprised critical public intellectuals, including Carnoy, Guigou, Gorz, Lister, Ohliger, Pineau, Reimer, Verne, Zimmer, and von Hentig. The Manifesto constituted a fundamental critique of Faure's repertoire for expanding the architecture of lifelong education to promote scientific advance and technology in support of economic growth. It argued that Faure, much like OECD on recurrent education, had effectively adopted human resource development as a repertoire for linking lifelong education with work-based training. This repertoire required workers to become more adaptable, flexible, and eager to learn in response to changes in technology and the demands of workplace (Verne, 1976). The Manifesto viewed lifelong education *à la Faure* as fundamentally shaped by economic requirements, reorganisation of production, exploitive conditions of working life, with learners required to develop themselves to match labour market demands. Arguing that the Faure Commission had not only accommodated economic needs, but had voiced the emergent neoliberal policy repertoire of deregulation, these critics articulated an alternative policy repertoire demanding autonomous social spaces for critical "unlearning to be" to take place in opposition to the mantra voices propagating "learning to earn" in the emergent "information economy" of post-industrial society.

In further responses to Faure's report, Verne (1974), Guigou (1975), Illich and Verne (1976), Dauber and Verne (1976), and Pineau (1977) referred to the threat of imprisonment in the global classroom of lifelong education. They argued that lifelong education, and notions of permanent education, would extend the "educational system" by incorporating out-of-school learning, mutual community learning resources, and autonomous autodidactic learning networks. From the perspective of "autoformation", Pineau (1977) argued that the repertoire envisaged by Faure served to incorporate out-of-school learning in formal institutional structures, thus threatening to constitute "aliénation permanente". Lynch (1979, p. 6) observed succinctly that 'The concept of lifelong education is not necessarily a danger though it may offer unlimited scope for further subjugation of man to the world of work, in the effort to combat increasing unemployment and to legitimate stubbornly unchanging wealth and income distributions within society and internationally.'

Re-reading first-generation policy narratives: Crossroads, blind alleys, and diversions

Among contributions to the literature addressing the shift in policy vocabularies since the 1970s, a significant number of studies have postulated that lifelong education *à la* Faure incorporated the critique of institutionalised education as articulated by the "radical" de-schooling repertoire. The analysis here, however, has argued that there is little documented evidence for such claims, indeed, to the contrary, de-schooling was critically dismissed in the Faure report. The Faure Commission, and later UNESCO, explicitly distanced themselves from these so-called "radical influences" and their "utopian ideas". There is, furthermore, overwhelming evidence that Faure's report encountered rigorous critique from ex-1968 militants, free school activists, anarchist-utopians, neo-Marxists, and de-schoolers, but also from mainstream academics.

These findings will be no surprise to those who have actually read the Faure report itself, and who know the secondary literature of the period. Such evidence, however, seems to have escaped many who continue to maintain that Faure's report was a "radical" document. Furthermore, although there is a well-established habit of referring idealistically to the report, this is overwhelmingly based upon reiterative cross-referencing to other recent secondary sources, which repeatedly refer to Faure as the "flagship" or "landmark" report in UNESCO policy formation on lifelong education in the early 1970s. Furthermore, when providing empirical evidence for arguments formulated, there is a disturbing nonchalance with regard to consulting primary sources. Conclusions drawn are more often based upon reiteration of other secondary sources rather than consulting primary sources, particularly the Faure report itself. On these grounds alone, the empirical foundations for the postulated shift in policy vocabularies demonstrates considerable shortcomings. These outcomes, however, do indicate a number of specific areas where further empirical research, based upon primary sources and secondary sources from the 1970s, is required.

There is, *firstly*, a serious need to the address dominance of English-language contributions to the literature cited in the field of adult education (Fejes & Nylander, 2014). Dependence upon secondary sources in English contributes to problematic understandings of policy-making processes, policy advocacy, and political activism in different countries and geo-political blocs in global terms (Mazenod, 2017). A particular lacuna is the absence of references in English-language publications to French-language sources relating to the development of "éducation permanente" in France from the mid-1950s onwards (Forquin 2002, 2004; Laot 1999, 2009; Hake, 2018). As Centeno (2011) has usefully pointed out, it is vital that more informed historical interpretations examine the political origins of "éducation permanente" in the late 1950s (Hake, 2018), its problematic adoption within UNESCO in the early 1960s (Elfert, 2018), subsequent recognition of "lifelong integrated learning" in the late-1960s (Duke, 1969), Lengrand's (1970) initial translation of "éducation permanente" as "Lifelong Education", and its short-lived transformation by the Faure Commission as "lifelong education" in 1972. Abundant literatures exist in French, German, Portuguese, and Spanish languages with reference to the historical reception and critique of the Faure report, not only in the European context, but also in Africa, South and Central America. This was manifest in complex circuits of cross-cultural production, dissemination, and reception in different languages (Pineau, 1977). Little of this impressive body of international scholarship is cited by the exceptionally parochial 'global' English-language literature.

Secondly, some recent critiques of the neoliberal hegemony in the world of 'adult education' have served to establish a 'a nostalgic orthodoxy involving revisiting the promise of lifelong education during the 1970s' (Hake, 2021, p. 38). This can be best

understood, in part, as the product of a defensive and nostalgic habitus associated with a long history of "mythmaking" in the world of adult education (Williams, 1959; Chase, 1995; Hughes & Tight, 1995; Strain & Field, 1997; Hake, 2021). This mythical tendency involves a collective engagement in celebrating Faure's report, together with UNESCO's "political utopia" of lifelong education (Wain, 2001; Elfert, 2015). Since the late 1980s, Faure's report has become the symbol for 1972 as a 'a year of affirmation for adult education' (Selman, 1989, p. 33). Faure's view of lifelong education has been reconstructed as an idealistic, humanist, and utopian myth. Citing Richmond's (1975, p. xiii) view that Faure's report 'aroused widespread debate on the Continent', Elfert (2019, p. 22) opines, 'The educational literature of the early 1970s contained frequent references to the report'. Historically, however, it is questionable whether 'the Faure report functioned as a catalytic agent for lifelong learning in Western countries' (Elfert, 2019, p. 22). The European Commission, for example, did not produce its' *For a Community Policy on Education* in 1973 'as a reaction to the Faure report' (Elfert, 2019, p. 22), neither Janne nor the EC referred to Faure (Hake, 2017). Indeed, the argument that 'it is not easy to assess the actual influence of the Faure report as there is very little literature on the subject' (Elfert, 2019, p.22), could mean that Faure's report, in fact, attracted little interest at the time. Richmond, for example, in the same 1975 source cited by Elfert, remarks succinctly that 'Already out of print, it has aroused little interest in the English-speaking world and a great deal of unfavourable comment from educationalists at home and abroad' (Richmond, 1975, p. 96.) As Huberman (1979, p. 205) scathingly adds 'lifelong education […] Is not a concept to which, up to now, academics and the research community has devoted too much time, apart from pointing out its weaknesses and limits'.

Excessive veneration of Faure's report among adult educators tends to constitute an occupational hazard involving the serious failure to recognise the rejection of Faure's report by radical libertarians, anarcho-syndicalists, and neo-Marxists during the 1970s (Guigou, 1975; Pineau, 1977). While it is argued that Faure's report 'has captured the imagination of scholars and educators to this day' (Elfert, 2019, p. 23), this sheds more light, however, on the myth-making habitudes of the "adult education" community itself. One recent accretion to this cottage industry in disciplinary mythmaking comprises the challenging proposition that the intellectually uncomfortable neologism of an "unfailure" can be of use when seeking to explain the historical absence of a positive reception for Faure's humanistic vision of lifelong education (Elfert, 2019, p. 18, p. 23). Biesta (2021, p. 1) goes one step further in contributing to myth-building, when he argues that the Faure report reclaimed a future for education '…that has not yet been'. Indeed, collective veneration for lifelong education during the 1970s has contributed to a veritable 'cultural formation' (Williams, 1981, p. 138) among a faction of adult educators, which actively contributes to mythmaking surrounding Faure's report. Myths, however, need no historical evidence to exert their influence; mythmaking is not scholarship. Research is required, however, that critically investigates mythical tendencies in some quarters of the academic world of "adult education".

There is a need, *thirdly*, to re-read Faure's report regarding its call for continued economic growth to reduce social inequalities (Lajeunesse, 1974). Published in the same year as *Limits to Growth* (Meadows, Meadows, Randers & Behrens, 1972), the Faure Commission rejected growing concerns in the early 1970s with unregulated exponential economic, population growth, and finite natural resources as was argued by the Meadows Report. Indeed, Faure's own preamble argued 'Some minds do not hesitate to suggest a total cessation of growth - zero growth […] without going openly to this extreme point to advocate, in the form of an ecological policy, a renaissance of Malthusianism' (Faure et

al., 1972, p. xxxii). He proposed that economic growth needed to be compatible with the quality of life and human balance. According to Pineau (1977, p. 290), 'this same rationality animates a scientific humanism for which knowledge of salvation is no longer in the sky or the sun but in the laboratory' [translation Hake]. This manifested Faure's personal a vision of future for education which embraced industrial and technological efficiency, and which articulated Faure's political position supporting a 'liberal educational offensive' (Jadotte, 1973, p. 3). Faure's report advocated invasive use of mass media and learning technologies, including out-of-school learning networks, facilitated by nation-states, to promote learning throughout life, everywhere. De-schooling critics regarded this as a repertoire for promoting lifelong education as 'a widely dispersed social process that threatened to engulf all social life outside of schools and would guarantee permanent inadequacy' (Ohliger, 1974, p. 54).

Indeed, when revisited more closely, the epochal shift from education to learning was announced by Faure, himself a radical liberal politician, and his Commission, which shared the then widely held 'progressive' ideology of a cybernetic vision of information society (Webster & Robins, 1989). Recognising second chance education's embrace of distance learning on a broad front in the early 1970s, Faure's report combined utilising mass media with extending educational provision. This was a liberal vision of cyber-capitalism that ignored issues concerning technocratic control, commercial interests in the educational marketplace, and emergent monopolies in producing learning materials (Hake, 2021). Faure embraced "purposeful learning activities" stressing out-of-school learning and utilising mass media as modernising technologies in promoting learning. Presenting his report to UNESCO, 25 September 1972, Faure stressed that democratising access to education demanded willingness to use modern educational technologies to expand the provision of "learning" throughout life (*Le Monde*, 1972). Faure actively propagated a shift from education to learning involving greater co-ordination and control promised by the mass media, with a future featuring algorithms and cybernetics dominating pages 102, 105, 106, 115, 143, 144 of the Faure report. These were core elements of Faure's modernising policy repertoire that promised 'the rebuilding of the educational city to allow learning to be' (Pineau, 1977, p. 290). Research is required that investigates the primacy granted by the Faure Commission to scientific knowledge and technology, particularly automated production, with its references to the promise of cybernetics serving the information economy, while it ignored the controlling dimensions of communications and the threat of a putative surveillance society (Hake, 2021).

Fourthly, it is vitally necessary to revisit the very diverse ideological-political repertoires that were articulated in the world of policy narratives the during the 1960s and 1970s (Hake, 2021). These included varieties of "anarchist", "libertarian", "situationist", "syndicalist", "socialist", "communist" including Maoist, "social-democratic", "new left", "corporatist", "liberal", "ecological" repertoires, together with emergent neoliberal policy narratives from the early 1970s (Bengtsson et al., 1975; Forquin, 2004; Guigou, 1971, 1973a, 1977; Hake, 2021; Laot, 2009; Pineau, 1977; Wolin, 2010). Faure and his Commission have been frequently associated in the literature with a variety of political affiliations including '…radical social democrats' (Lee & Friedrich, 2011, p. 157), while Elfert (2015, 2018) persists with more recent references to both '…social democratic liberalism' (2019, p. 18), and to '…socialist and social democratic forces' (2019, p. 20). As noted earlier, Faure himself has been associated in the literature with a variety of political positions including representing the first-generation of 'anarchistic-utopianism and neo-Marxian perspectives' (Boshier, 1998, p. 9). Closer to the historical record, most published references tend to identify Faure with the left-of-centre in the French political spectrum. Indeed, Faure himself has been identified as 'a French socialist politician'

(Elfert, 2019, p. 19). Disciplinary veracity demands, however, that historians distance themselves from these widely accepted accounts regarding Faure's social-political position in post-war French political life during his long career as a well-respected and erudite "public intellectual".

A long-serving French career politician, Edgar Faure (1908-1988) was "un homme politique" (Krakovitch, 2006), a pragmatist and opportunist, was originally elected for the right-of-centre liberal Radical Party. He led conservative elements in this socially "liberal" party, held Ministerial office many times in the Fourth Republic, briefly as Prime Minister in 1952 and 1955, but always in right-of-centre governments (Lestrohan, 2007). Faure's own centre-right coalition cabinet was defeated in January 1956 to be replaced by a socialist-led coalition, which almost immediately passed the first legislation in France regulating "éducation permanente" (Hake, 2018). A skilled exponent of 'managerial pragmatism' in politics (Loriaux, 1991, p. 149), Faure, joined the Gaullists in 1958, becoming an influential politician during the Fifth Republic.

As Minister of Education 1968-1969, Faure succeeded in securing right-wing Gaullist support for his albeit very moderate reforms of universities (Patterson, 1972; Fomerand, 1977). In 1969, Faure addressed the Paris meeting of the Council of Europe's Standing Conference of Ministers, where Olaf Palme, Swedish Minister of Education, explained Swedish recurrent education policies (Rubenson, 1994). During this meeting, Faure presented French policy for "éducation permanente", but, according to Bengtsson (2013), Palme's advisor on recurrent education at the time, without a strategy as to how it was to be implemented. He was dismissed in late 1969 following the resignation of General de Gaulle. Faure chaired UNESCO's commission 1971-1972, subsequently becoming Minister of Social Affairs, 1972-1973, and was Chairman of the National Assembly 1973-1978.

Although Faure was known, and indeed admired in some quarters, as the perennial weathercock of post-war French politics given his ability to successfully serve governments of diffuse political plumage, this categorically excluded socialist-led governments. Throughout his career, Faure refused to serve in coalition governments led by the French left-wing social-democratic party, Parti socialiste (PS); the party Jacques Delors joined in 1974 on returning to active party politics. Invited, in 1981, to support Mitterand's socialist coalition government, Faure refused, as noted by Lee and Friedrich (2011) in their footnote 6, on the grounds that the President was prepared to co-operate with the Parti communiste français (PCF). This suggests that questions concerning the veracity of references to the socialist pedigree of Faure himself, let alone the Faure report demand far more nuanced historical analysis of the political ideologies and policy repertoires at work in transnational and national educational policy networks during the early 1970s.

En route to lifelong learning: unexplored connections

This paper has investigated interpretations of the relationships between first- and second-generation policy narratives with particular reference to "lifelong education" and "de-schooling" as policy repertoires. Exploring these relationships, it focused on a critical re-reading of Faure's report regarding its supposed incorporation of de-schoolers' critique of institutional education, and the de-schoolers critical reception of the Commission's report. The findings identify serious shortcomings regarding the historical foundations of widely shared interpretations of first-generation narratives. This critical re-reading suggests that dutifully mapping the "adult education" canon is inadequate when tracing

historical relationships between policy repertoires during the 1970s. It identifies the need for critical perspectives on often unexplored connections. Furthermore, the analysis here gives rise to serious reservations concerning the broader interpretative framework postulating that shifts of policy paradigms from lifelong "education" to lifelong "learning" have taken place, and the historical character of these shifts. Many accepted accounts offer no more than a historical teleology, while sustained historiographical analysis of contesting political repertoires is required in order to establish residual, emergent, hegemonic, oppositional, and alternative cultural repertoires (Williams, 1981).

Likewise, the recurrent education narrative of the 1970s is regarded by some as still alive and doing since the early 1990s well in the hands of OECD and the EU in the form of the neoliberal lifelong learning policy repertoire (Borg & Mayo, 2005; Biesta, 2006; Barros, 2012; Milana, 2012; Nicholl & Olesen, 2013). Rather than focusing on the post-1990s, however, research is needed that examines how the failure of social democratic repertoires in the early 1970s created a political vacuum that was adroitly occupied by emergent neoliberal repertoires articulating the reconstruction of capitalism based on deregulated learning in the workplace, aided by weak responses by national governments to the 1973 global oil crisis (Prasad, 2006; Levinson, 2016). This calls for serious reconsideration of Faure's proto-neoliberal technocratic embrace of 'maximum vocational mobility' (Faure et al., 1972, p. 196), which, with its focus on workplace learning and invasive mass media, threatened to make lifelong education a quotidian requirement for all in a credentialed and mobile workforce.

Critical historical perspectives on policy repertoires suggests that comparative policy research also needs to seriously reconsider contributions to the literature that postulate radically different policy significations of "lifelong education" in the Faure Report for UNESCO in 1972 and OECD's 1973 report on "recurrent education" (Milana, 2012; Fejes, 2013; Boshier, 1998; Barros, 2012; Medel-Añonuevo et al., 2001). Rereading Faure's report demonstrates that it systematically and approvingly appropriated "recurrent education" as a policy repertoire, in the French translation as" éducation récurrente" and "éducation iterative". Historically informed policy research is required calling for further empirical research regarding the Faure Commission's position concerning the recurrent education repertoire developed in Sweden in the late 1960s and its adoption by OECD in 1973.

Revisiting "lifelong education" in the age of "lifelong learning" appears to be a hazardous process. As Field (2001, p. 12) reflects, 'It is tempting to conclude, as some have done, that the semantic shift from "lifelong education" to 'lifelong learning' marks a sharp turn towards vocationalism and away from emancipation'. This paper has suggested that overarching questions about the historical relationships between first- and second-generation policy narratives still have to be posed, let alone convincingly answered. Recent contributions addressing the two generations have failed to generate rigorous historical research needed to explore issues of continuity and discontinuity in public policy formation. In the words of Williams (1959), the canon of adult education remains characterised by special pleading and mythmaking. Research is now needed that contributes more informed understandings of the historical and contemporary socio-political conditions in which policy repertoires articulated social justice and sought to redistribute adult learning throughout the life course. Further research is needed to investigate both historical and contemporary struggles to collectively organise opportunity structures that are capable of mobilising engagement in "really useful learning" throughout the life course in the tough times of financial capitalism in the crisis of the early 21st century. This will require, however, a more sound empirical basis for a critical historiography which makes it possible to disentangle the history of past political

struggles from the distorting myths that might serve some current academic agendas rather than historical scholarship.

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Metaphors we learn by: Practitioners' conceptions of the meaning of non-formal education in Estonian context

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Abstract

Non-formal education is the central standpoint and practice of lifelong learning. The aim of the article is to demonstrate the possibilities of construing the meaning of non-formal education through practitioners' conceptions in Estonia. At the same time, we show how non-formal education practice can enrich other types of education and how these principles may be more widely applied in formal education as well. The current research based on metaphor analysis draws on the materials collected in focus group interviews with practitioners (n=17). Analysis revealed that practitioners describe non-formal education as a cooperational journey of discovery which requires effort, concentrates on development and is related to emotions, play and creativity. At the same time, non-formal education is defined through metaphors of cultural symbols and open space. The diverse opportunities of non-formal education create the basis for choices and tolerance to differences, whereas the emergence of border area metaphors confirms the deep rooted idea that non-formal education's place lies in between different types of education.

Keywords: Adult education, educational metaphor, lifelong learning, metaphor analysis, non-formal education, non-formal learning

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Introduction

In the centre of contemporary metaphor concept founded by Lakoff and Johnson (2003) are connections between language, thinking and perception. Their concept is based on a presumption that metaphors form the structure of every day concepts and it is reflected in language use. They posit in their work ‘‘Metaphors we live by’’, first published in 1980, that metaphors determine people’s behaviour and thinking and that with the help of metaphors one can create new meanings and explain life (Lakoff & Johnson, 2003, p. 4). In our article with the paraphrased title, referring to the aforementioned work of the two scientists, we demonstrate possibilities for explaining the meaning of one of the most important parts of life – learning – and one of its significant aspects – non-formal education – as it is understood in Estonian context.

The term *non-formal education* came into use in relation to adult education when such education became an inseparable part of work and personal life and European and American educational systems were looking for opportunities for complementary education (Holmberg, 1986). As a reaction to the set limitations of formal education, *non-formal learning* signified a flexible type of education that was based on the learner’s needs (Dudzinska-Przesmitzki & Grenier, 2008). A broader discussion on non-formal education started in the 1970s, though the term was first used already in the 1947 UNESCO education report (Colley et al., 2003). Non-formal education is non-certificated, happens outside the called classical school environment, is flexible, purposeful and voluntary, takes into account the learner’s autonomy and individuality and lasts a lifetime (Coombs & Ahmed, 1974; Dudzinska-Przesmitzki & Grenier, 2008; West, 2009).

As everywhere else in Europe, the history and tradition of non-formal education and learning in Estonia is quite old. Starting from the 19th century every kind of self-development has always been considered respectable for people of every age: in different folk societies, song choirs, church congregations and associations (Taru et al., 2015). The year 1906 is considered to be the start of the history of adult education in Estonia as it was the time when the Society for Education of Estonian People was founded in order to improve the general level of people’s education (Jõgi, 2020). Non-formal education for adults has been provided by different organisations, including free educational movements, e.g. cultural and folk universities – seen as educational organisations focused on learner-centredness and consideration for adult learners’ individuality to support their studies (ibid.). In the former Soviet Union non-formal education served as a means of forcing the ideological beliefs and planting political convictions among the existing working class as well as their next generations. On the other hand, there were trainings and courses for workers, managers, teachers and other members of society, the content of which was not only ideological and the approach was very similar to the nowadays understanding of non-formal education as an opportunity to support an adult’s needs and development (Juurak, 2000). Thus, the main idea of non-formal education – openness, flexibility and respect for the learner – has remained the same despite the passage of decades and change of regimes.

Social agreements and meanings are reflected in written texts as well as in oral language use. How we think, talk or write about things shows the way we understand and perceive the world. In educational policy documents and educational sphere in general more and more attention – alongside with the formal education – goes to non-formal education and their convergence (HTM, 2020; UNESCO, 2020). At the same time little is known about how practitioners from different spheres of expertise, who use non-formal education methods and principles in their everyday work, understand the meaning of such

education. According to Frackowiak (2017), many concepts in education are abstract or not clearly defined in people's experience (e.g. *emotions*, *ideas*, *time*), however, it is possible to explain them through metaphors (space orientation, objects and the like) in the same way Johnson and Lakoff (2003) describe the transfer of concepts.

The necessity to analyse the meaning of non-formal education has been indicated in Estonia (Karu et al., 2019) and elsewhere (Colley et al., 2003). That is why we set the goal of the research to analyse the metaphors of non-formal education in practitioners' conceptions in order to determine: 1) what metaphors the practitioners use to construe the meaning of non-formal education and 2) what specific characteristics of non-formal education are revealed through the analysed metaphors. This enables us to demonstrate how the principles of non-formal education enrich other types of education and different spheres of expertise, including adult education. The acquired knowledge can be applicable for non-formal education practitioners as well as for those engaged in promoting adult education and in support of non-formal practitioners' professional development. The results describe significant facets of Estonian context which can be transferred to any country's sphere of adult education.

The concept of non-formal education

As everywhere else in the world, we differentiate three types of education in Estonia. Formal education, which is arranged in accordance with curricula in schools, is purposeful and conducted under the instruction of qualified teachers trained to teach a specific subject and in which the learning process and its results are assessed. Informal education is, on the contrary, non-purposeful from the learner's point of view and takes place in everyday life situations with its results remaining for the large part unnoticed immediately by the learner (HTM, 2020). The place of non-formal learning is between these two types, i.e. it has the characteristics of both formal and informal learning (Malcolm et al., 2003).

Non-formal education is a way of learning which includes hobby education, in-service complementary training, youth work, environment protection, career counselling and other opportunities for self-development. It is defined as a purposeful voluntary lifelong learning which takes place outside school (Coombs & Ahmed, 1974). The opposition to the classical obligatory school education with its set and structured curriculum, certain assessment criteria and with the acquired knowledge being attested by a certificate (the so called 'formal education') has always been the main construct of non-formal education – both in official as well as other public language use (Karu et al., 2019). However, instead of the opposition, nowadays educational strategies stress the importance of consciously purposeful and voluntary learning in different environments (HTM, 2020; UNESCO, 2020).

Non-formal learning provides formal learning with additional value and offers alternative learning approaches, diversifying the possibilities to acquire education (Colley et al., 2003). Non-formal education often brings forward the idea of the learner's autonomy as well as the instructor's supportive role (Knowles et al., 2015). In addition, the main principles of non-formal education are valuing the learner's inner motivation and determination to reach the set goal, use of various learning environments and methods as well as conscious focus on the learner's development. The latest research also indicates that Estonian education system has reached or is reaching the stage where there is one learning (the so called 'personal learning journey'), both in and outside the school, the participants of which set their individual goals in the frame of general goals to raise their

interest in knowledge and skills, but, first and foremost, in acquisition of experience. (Põlda, Reinsalu, & Karu, 2021) In our research we proceed from exactly these points of view and consider non-formal education an opportunity to learn during the whole life and voluntarily, involving the previous (life)experience into the learning process, setting learning goals and reflecting on the acquired knowledge.

Metaphors in education

Metaphor is a conceptual phenomenon through which people create abstract constructs, structure their thinking and make sense of the world, their own behaviour and activities (Lakoff & Johnson, 2003; Sfard, 2014). According to the conceptual metaphor theory, a metaphor is a natural language unit of human conceptual system in which one concept is revealed through another. As both concepts may belong to different domains, the conceptual metaphors are characterized by the conceptual relation between the two domains – the source domain and the target domain. The most wide-spread example of a conceptual metaphor is LIFE IS A JOURNEY. (Lakoff & Johnson, 2003) Thus, it is to some extent expected that LEARNING IS A JOURNEY is the most known conceptual metaphor in educational area (Cameron, 2003) which explicitly refers to the significance of process in learning, possibility of choice and change of people's points of view and broadening of their horizons (Frąckowiak, 2017). This standpoint is supported by the education strategy soon to be applied in Estonia and its vision document.

Educational metaphors have been treated from many aspects. One can differentiate metaphors describing various approaches to learning: learning as acquisition – teacher-centred approach; learning as participation – student-centred approach; learning as constructing meanings – constructivist approach to learning, and learning as maintaining vitality – an approach that values lifelong learning (Davis, 2018; Guilherme & Souza de Freitas, 2018). These metaphors reflect the changes that have taken place in education, whereas the earlier approaches to learning have not disappeared with the emergence of the new paradigms and are also reflected in the contemporary education system (Davis, 2018). Thus one can assume that education system is a multilayered mix of various approaches to learning which, in their turn, are revealed in the applied metaphors.

There are metaphors in our everyday language use that for various reasons have become universal (Säljö, 2003). Such metaphors are called grand or dominating. Grand metaphors reflect different approaches to learning: in the teacher-centred approach the teacher is considered a creator (sculptor's metaphor), whereas according to the student-centred approach, the teacher is the supporter of the student's development (gardener's metaphor) (Guilherme & Souza de Freitas, 2018). The teacher's supporting role is also described by the metaphors related to the student's choices and responsibility, e.g. 'the Teacher is like a multitude of doors and the Student chooses which doors to open' (ibid., p. 952). One might suppose that language use also demonstrates the metaphors indicating dialogue and cooperation. However, the research works (Aava, 2010; Cameron, 2003; Guilherme & Souza de Freitas, 2018) show the opposite – (formal) education is described from the perspective of the individual and their needs; and the teacher's – not the learner's – responsibility for the learning process is accentuated.

In addition to the multilayeredness of education system there has been a discussion on its subordination to neoliberal ideologies and market economy (Apple, 2001; Bjursell, 2016; Guilherme & Souza de Freitas, 2018). The marketization of society has a double influence on education: on the one hand, market economy creates social inequality which is reflected in the availability of education; on the other hand, education depends on the

market and it entails excessive standardization and may transfer power to educational leaders (Fejes & Salling Olesen, 2016; Milana, Kopecký, & Finnegan, 2021). At the management level the metaphors indicate the ideologies dominating education, e.g. adult education as market, integration, democracy, which shows that contemporary theories of adult education are influenced by and intertwined with economic theories (Bjursell, 2016) but also refer to the necessity of cooperation and joint creative work in the learning process (Przybylska, 2009).

Similar tendencies have also emerged in adult education in Central and Eastern European countries: though such metaphors referring to creativity and cooperation are used like *Paradise for Creative Minds* and *Space for Interpersonal Communication*, it has also been found that adult education is *Gold Mine*, *Catalyst of Economic Growth* and *Solution to the Social Problem* (Przybylska, 2009). Similarly, Estonian educational discourse reveals the competition-centredness of education (client attendant metaphor), subordination to economic and educational policy interests (educational economics metaphor) and the issue of having access to education (resource metaphor) (Aava, 2010). The aforementioned demonstrates that metaphors by which the social reality is constructed (Redden, 2017) may refer in educational sphere both to possibilities as well as problems including oppression (see Freire, 1972).

The metaphors help to describe adult education practice and theory in order to better understand the problems of the area on the one hand, and, on the other hand, to reveal new perspectives (Edwards, 2016; Frąckowiak, 2017). This way there have emerged four categories of metaphors on the learning process level: natural, geographical, astronomical and pictorial (ibid.), illustrating dimensions and cooperation in learning environment. Adult education and lifelong learning metaphors are the moorland, desert or tundra metaphors, demonstrating changes in adult education and also courage and openness to act in the area as well as limitations for the action and the participants' opportunities (Edwards, 2016). The dual attitude to adult education is also seen in metaphors *blessing and penance*, *running and juggling* as well as *addiction for learning* (Proctor II, 1991).

Considering the aforementioned, it is intriguing to examine the language constructs of non-formal education and to find out whether the used metaphors reveal the cooperational aspect of learning process as a dominating discourse and what the metaphors characterize generally in learning, be it formal or non-formal.

Research arrangement

Metaphor analysis allows to better understand the researched phenomenon, including non-formal education (see Redden, 2017). Although the approach, which uses metaphor analysis, is not commonly accepted for investigation of concepts of education and learning, it is still a widely used method to bring out the meanings, including conception of teaching and learning (see e.g. Candy, 1986).

In addition to conventional metaphors i.e. metaphors that happen to appear in the text, the scientists have turned their attention to novel i.e. elicited metaphors, which the interviewed were explicitly asked to produce (Low, 2015). In order to collect such elicited metaphors, the interviewed may be asked to finish sentences (e.g. *The teacher is like..., because...*), write short texts, explain a drawing, fill in a questionnaire, take part in an interview or even a combination of the aforementioned tools may be applied (Seung et al., 2015). Whereas an interview is considered to be the most effective tool for collecting data, because open-ended questions allow to address the topics in-depth, reaching to personal conceptions and beliefs (ibid.). As the researched metaphors are in essence

conceptual metaphors, which manifest in the form SOURCE DOMAIN IS TARGET DOMAIN (Lakoff & Johnson, 2011), in our analysis we follow this classical metaphor theory principles.

17 focus group interviews were conducted in autumn 2019 in the framework of a wider research *"Meanings of non-formal learning from the perspectives of practice and practitioners"* that was carried out in Estonia. The interviews were conducted with non-formal education practitioners[1] to determine how they construe the meaning of non-formal education. The total number of the interviewed practitioners was 64 and they represented the following areas: adult education (AE), youth work (YW), culture (C), welfare (W), economics (E) and environmental education (EE). The choice of areas was determined by the previous research (Karu et al., 2019) which demonstrated that the policy documents of these six aforementioned areas highlight on non-formal education in Estonia and the practitioners active in those areas are guided by the named documents in their everyday work. The sample included representatives of public, private and non-governmental organisations.

The interviews consisted of four parts, whereas the current article concentrates on the first two, which contain elicited metaphors. In the first part the participants were asked to describe non-formal education with the help of a photo they brought with them. In the second part the participants explained what, in their opinion, is and is not non-formal education. They were also asked to name a metaphor that is associated with non-formal education. In those cases when the interviewed came once again back to some elicited metaphor, we also used other parts of the interview where practical opportunities of non-formal education were dealt with.

To analyse the collected data, we divided the transcripts between the researchers. Each of them entered into the common table the elicited metaphors appearing in their analysed texts, the texts' excerpts with the explanation of these metaphors and the characteristics of non-formal education found in the excerpts. It was followed by a consensual discussion of all the language units presented as metaphors, which would be in accordance with classical metaphor theory as well as non-formal education principles (see above). The resulting final sample contains 86 metaphors, including two repeated ones. After that we divided the metaphors into subcategories, taking into consideration the context when performing detailed differentiation of meanings (on metaphors and context-bound units see Ricoeur 1991), and this later formed the basis for main categories. Some metaphors, the so called hybrid metaphors (see also Poom-Valickis & Oder, 2013), belong to several categories.

The non-formal education metaphors were divided into five main categories (see the table in Annex). We describe below the main categories according to subcategories' capacity, point out the metaphors that make up the subcategories as well as the characteristics of non-formal education as manifested in the practitioners' conceptions. To illustrate the results, we present excerpts from the interviews accompanied by the sign signifying the practitioner's area of expertise and the ordinal number of the interview.

Results: non-formal education metaphors in practitioners' language use

Metaphors related to the process

The metaphors from the journey subcategory are mostly connected with a physical place, with physical change of the location. One part of them expresses a longer purposeful process, e.g. *flying*, *painting*, *journey* (example 1). Whereas the other part is related to a

sudden change which takes place during the journey or at the end of it, e.g. *coming out of the tunnel*, *descending the hill*, *soaring up.*

1. My image is of such a hiking journey when there, far away, one sees a mountain. The aim is to get to the top. /---/ And at some point maybe the journey becomes even more important than the final goal itself. (YW2)

The journey subcategory is associated with the subcategory of development, because if a journey is a purposeful process, it is accompanied by development. In the interviews non-formal education was explicitly compared to *development* and *self-development*, at the same time the opportunities for development were also indicated indirectly, e.g. through the *flower* metaphor (example 2).

2. For me it's like a flower, and this expresses growth and development. /---/ Continuous development and then bursting into bloom in the end. (EE1)

The development subcategory indicates both spontaneous processes as well as ideas of work and effort. The effort subcategory metaphors reveal that non-formal education is active contribution, born in cooperation, rich in experiences; at the same time, the importance of work and working was also stressed. The idea of making an effort is clearly demonstrated by the metaphor of the bow (example 3), where pulling of the bow's string is equalled to tuning oneself in before an activity.

3. Like a bow: first there's a pull, and then it goes. /---/ this effort at the beginning, when you have to pull the string, to tune yourself in somehow. (AE1)

The discovery subcategory metaphors are the most prominent among the ones related to process. The interviewed compared non-formal education to the diverse nature of *rain forest/jungle* and an *adventure park,* offering a chance to overcome oneself, a generally thrilling *adventure* (example 4). The metaphors of *a tunnel* and *a door slightly ajar* also indicate a wish to discover, as well as *groping* (*feeling one's way*), which helps one to get to know (new) people and environment.

4. My first thought is adventure. If I am interested in developing myself in non-formal context, then I want some thrill and I will choose such a thing which I certainly don't know yet. (EE1)

For the participants non-formal education is also associated with spending free time. For instance, *theatre*, *puppet theatre*, *museum* belong to the subcategory of spending time. Also *the Song and Dance Festival*, an important part of Estonian national culture, where one can enjoy together someone else's creative work (see the creativity subcategory), but also simple *playing* and *intellectual game*. All these activities may be summarised by the joint name, using the metaphor *intelligent dispelling of boredom* as in example 5.

5. Like dispelling boredom, intelligent dispelling of boredom. (W2)

The subcategory of spending time is directly related to the subcategory of creating a whole with such toy metaphors as *Lego blocks*, *kaleidoscope*, *Rubik's Cube* and *puzzle* and also a creativity metaphor of *stained glass*. They indicate that non-formal education consists of small parts which have to be put together to make up a whole (example 6).

6. Some different puzzle pieces which in the end become that whole picture, meaning that you can experience, learn different things and just be and in the end it will all become a whole. (M2)

The metaphors belonging to the cooperation subcategory refer to a body of beings, which may be for instance a *company* or *fish school* (example 7). In addition to forming a body, cooperation is reflected in joining of participants as expressed in such metaphors like *creating societies* or *making bridges* and *finding good notes between the pauses.*

7. The sea is big and you can choose your own school of fish and move from one school into another. But there may be one word which is a keyword in non-formal education for me – it is respect: that there is a lot of respect between the fish and for the environment too. And also for oneself that if you can't make it, then you take a break and do not disturb the others. (EE1)

Metaphors related to the subject

One part of the creativity subcategory metaphors is connected with fine arts. Non-formal education is presented as *theatr*e (including *puppet theatre*), *stained glass* and *painting/picture*, as well as *glass bead game* – in other words, everything that presupposes *creativity* (example 8). As playing is also a creative activity, so the other part of this subcategory contains metaphors related to toys, e.g. *puzzle*, *kaleidoscope* (see toy subcategory).

8. When I started thinking what this non-formal education actually is, then my first thought was creativity, some fun, some pleasure. (W1)

The emotion category shows that non-formal education is connected with *fun* and *pleasure* (examples 8, 9), and, in addition, the metaphor *beauty of the game* demonstrates that non-formal education is a voluntary activity which supplies good emotions.

9. It's a little pleasure, voluntarily taken up for oneself. (W2)

Metaphors related to the object

The majority of metaphors from the symbol subcategory carries cultural values. *The map of Estonia* and *the Tall Hermann Tower with the Estonian flag on top* are connected with national symbols (example 10). The latter is a tower near the Estonian Parliament's building with the Estonian national flag flying over its top. However, the Hermann Tower metaphor's focus is not the tower itself but it is the reflection on the surface of water in the moat, which surrounds the ancient Toompea castle, revealing the interpretational and also self-reflectional aspect of non-formal education.

10. The Hermann Tower with the Estonian flag on its top /---/ and then how its reflection down here, on the moat's water, the top of the same tower and this flag, this actually is the whole point of it all /---/ I wouldn't associate this [non-formal education] so much with any person or place but with one's own responsibility to keep your eyes open and to see some connections or some points of view. (W2)

The model subcategory is quite close to the symbol subcategory and the metaphors belonging to it form a heterogenic group. Non-formal education is compared to *the map*

of Estonia (example 11) and the *model of the country*, while the metaphor *miniature life* reveals the vital side of non-formal education.

11. So, I have such an image of the map of Estonia. (YW2)

Metaphors like *kaleidoscope*, *Rubik's Cube*, *puzzle*, *Dixit cards* and *Lego blocks* belong to the toy subcategory as well as more sports-like toys like *bow and arrows* and *balls*. A part of them is also related to spending time subcategory (see above). So the metaphor in example 12 stresses the inner determination and an opportunity to learn through play. While the usage of the objects is usually determined by practical necessity, the toys reflect more the childhood nostalgia and sense of safety, a play being a combination of practicality and conditionality.

12. I remember this cartoon "Laughing ball" /---/, but we bring more such balls here. Let's say exactly this zeal and motivation, this fun of play and joy. (E1)

A subcategory of a storage place came forth, referring to the idea of practicality, the prototype representatives of which are *storage box* and *treasure box*. Using the metaphor of a storage box, the participant in example 13 describes non-formal education as a diverse purposeful activity, the final result of which will become clear only in the end.

13. The storage box here is quite a good comparison. Firstly, here are very many different things, secondly, there's this something, which I'm going to look for with a purpose in mind. /---/ The other point is that I don't see the bottom, /---/ that it's a surprise, actually. (E5)

Metaphors related to the opportunity

In the core of the diversity subcategory there are things and activities related to playing which have a certain purpose and which, according to the interviewed, are creative, special, non-standard and diverse (see toy subcategory). The metaphors indicate the various opportunities of non-formal education, described by such nouns and adjectives as *multicolouredness/multitude* and *colourful*. Thus, non-formal education enriches formal education, adding colours and shades to the black-and-white definite images and frames, at the same time blurring the borders (example 14). Similarly to the cooperation subcategory, one part of the diversity subcategory is connected with people as non-formal education takes place in cooperation with others (*company*, *fish school*).

14. It enriches this very certain black-and-white picture that has these very clear and definite lines /---/ But non-formal education adds different colours and shades and images. (YW2)

Some metaphors forming the difference subcategory refer to being something or someone, e.g. *a clever cow*. Example 15, through the red fly agaric metaphor, demonstrates drawing attention caused by differing from the norm and argues that learning takes place in the case when one thinks beyond the difference and starts making connections. The other part of the metaphors from this subcategory shows non-formal education as being *outside of the classical learning form*. The learning happens on the basis of free will and a purpose and involves the leaner's experience, body and activity.

15. Red fly agaric. /---/ How you can't just go past it, you just notice it, and at the same time how far you can go and think and connect from that point further

on, exactly this making connections is one of the key words for me about non-formal education. (EE1)

Metaphors related to the environment

The movement metaphors, belonging to the open space subcategory, describe non-formal education as a movement outward from a limited territory: *from a classroom*, *a classical way of learning*, *a box or a frame*. The reference to cognitive processes, learning methods, guidance and environment support appear as features of the movement metaphors in the descriptions of the participants (examples 16, 17).

16. A child learning somewhere outside of the classroom, far away from school. /---/ They are like in contact with all this nature, as if sitting on this very ground. (EE1)

In addition to movement metaphors, the metaphors of static nature also carry the meaning of open space, when they describe some element of the environment (*landscape*, *empty paper*) or an event (*World Cleanup Day*). They demonstrate learning as an event in the globalised society looking for balance with nature. The metaphor *sky is the limit* also belongs here (example 17), illustrating a wide range of opportunities in non-formal education. At the same time the metaphor denotes the border area as it sets a frame for the learning, a seemingly supernatural and yet certain.

17. Thinking out of the box /.../ Then there comes creativity, some creative education, doesn't it, one gets out of formal education, really out of the box. Sky is the limit. (E3)

The border area subcategory emerges mainly as border drawing elements (*door*, *tunnel*, *zebra stripes*) and activities (*opening/closing the door*, *driving into formal education*). A metaphor with a special meaning is *a door slightly ajar*, which expresses doubt. Whereas the Russian expression *не мясо не рыба* ('not meat and not fish either') refers to the diversity of non-formal education and to the multitude of possibilities for construing the meaning of the concept (example 18). Thus the position of non-formal education is in the border area between different and diverse possibilities.

18. The first that came to mind was the Russian не мясо не рыба, that as how many of us are sitting here, that many possibilities of interpretation there are, I think one could make a debate or a discussion about it. (W2)

The subcategory of cultural space shows widening of the learning room outward from the classical learning environment as the metaphors of the open space also indicate. In addition, it refers to a broader connection of education and learning with culture in general – learning is an inseparable part of culture, essentially interwoven with it via common elements (e.g. constructing identity, consolidation of principles and attitudes, formation of habits and traditions). The metaphors of culture space (*the Song and Dance Festival*, *museum*, *theatre*) indicate larger narratives, e.g. Estonians are a culture nation, and reproduce the widely adopted as natural conception that education and culture are *a priori* interconnected.

Discussion and conclusion

The general meaning of non-formal education has been construed via opposition to formal education both in historical (Coombs & Ahmed, 1974) as well as in contemporary conceptions (Jarvis, 2002; Knowles et al., 2015; Merriam et al., 2007). The metaphor analysis revealed the following characteristics in the conception of non-formal education understood by practitioners.

- The metaphors related to the process: valuing the learning process; purposefulness; offering options; focusing on the learner's development and broadening their horizons and conceptions; the learner's activity and their active contribution; cooperation between the participants of the learning process and learning from each other; division of the whole into parts and the skill to put the parts together into a whole.
- The metaphors related to the subject: creativity in learning; valuing personal experience; the learner's activity; looking for an alternative learning approach and, through that, also valuing the traditional learning.
- The metaphors related to the object: connection between socio-cultural context and real life; a learning approach which complements and supports formal learning; the values and interpretation possibilities that emerge in the learning process; importance of reflection and a sense of safety in learning; simulation as a possibility to support learning.
- The metaphors related to opportunity: diverse forms and ways; alternative choices; the learner's independence and decisiveness, responsibility for one's learning; self-directed learning; different and personalized modes of action.
- The metaphors related to the environment: openness and a multitude of opportunities; creativity; gaining balance with the nature; supported learning; learning as sharing the culture and its connection to formal education.

The metaphor analysis revealed that non-formal education is perceived as purposeful, voluntary, supports the learner's development and self-reflection and offers diverse learning approaches and environments. It supports and values the learner's activity, cooperation between the participants and learning from each other, the discovery-like and playful character of learning, and also voices the seriousness of non-formal education in the context of general education. The current research showed that, in addition to the opposition, non-formal education is seen as an opportunity to diversify the acquisition of education via alternative learning approaches (compare Colley et al., 2003). Moreover, this concept of education is based on cultural values and beliefs. Therefore, the metaphors we learn by reflect different facets of both educational sphere as well as our cultural space.

The new national educational strategy of Estonia focuses on the learning process and describes the learner's coping in this process (learner-centred, the so called 'changed concept of learning'). This is carried out with the help of journey metaphors – learning ways and paths. The importance of the conceptual change is also confirmed by the present research as the metaphors referring to the process outweighed others in the language use of non-formal education practitioners' (see table). The most well-known was the metaphor NON-FORMAL LEARNING IS A JOURNEY, which is considered to be the most wide-spread educational metaphor, being derived from the conceptual metaphor LIFE IS A JOURNEY, detected by Lakoff ja Johnson (2003). The journey was associated with stable ongoing movement (e.g. *riding a bike*, *hiking*, *working*) but also with such activities that bring extreme and sudden changes (e.g. *sudden descent*, *adventure*, *coming out of the*

tunnel). Other works indicate the journey as creation of opportunities, a chance to broaden one's horizons and to see new points of view (Frąckowiak, 2017). The current research adds one more significant aspect – the journey that describes the process also helps one out of the comfort zone, supports development and cooperation and is, in addition, an opportunity to 'intelligently dispel boredom'.

We would like to point out the subcategory of spending time as no such issue is mentioned in scientific literature. This category also contains the connection between non-formal education and play (see also toy subcategory). Estonian theatre scientist Liina Unt states that toys acquire meaning in a play situation (2005); therefore, the toys related to learning process are connected to and acquire their meaning in the learning process. Contrary to the widely accepted conception that play is an important part of culture reproduction – the process of transmitting cultural values, practices and shared understandings –, Unt (2005) brings to the light another aspect: an activity with no research-like, experimental and transcendental element – in other words playfulness – cannot be considered playing. Thus, play is important and seriously considered not only in non-formal education but in education in general. Play focuses on effort and is an important opportunity to learn. Thus, the research demonstrates the positive meaning of play and of spending free time in interpretation of learning at any level of education.

Though some metaphors were related to only one subcategory (e.g. *storage box*), most were, however, hybrid i.e. they were presented in several subcategories. The metaphors demonstrated the multi-facet character of non-formal education. Metaphors referring to play and toys were presented in six subcategories in total and thus indicated that play and playfulness are among the most significant characteristics of non-formal education. Connection with play revealed the discovery-like and creative facet of non-formal education, its characteristic feature to create and value emotions and its dimension of supporting cooperation and a skill to create a whole. Such metaphors as the puzzle and Rubik's Cube highlighted an important characteristic of non-formal education to value small parts in learning – 'learning bites' – as describing learning journey in our new educational strategy (see HTM 2020). The research demonstrated that usage of play elements in non-formal education creates for a person a freedom of choice to reach their goals in a multitude of ways.

Similarly to play metaphors, movement metaphors appeared in several subcategories, which, in its turn, confirmed the importance of process in learning and also indicated the direction. In non-formal education the movement is directed 'outward' – be it from formal education, classical learning environment or a thinking pattern (*out of the box/frame*). The coming out of the tunnel and the door metaphor indicated such characteristics of non-formal education as valuing choices and possibilities, support of the learner's talents and strengths and its close connection to culture space.

The third larger group of hybrid metaphors emerged as culture symbols and culture space metaphors, which were also present in the subcategory of creativity, cooperation, difference and diversity. The conceptual metaphor NON-FORMAL LEARNING IS A SONG FESTIVAL sums up all the features of the aforementioned subcategories and shows non-formal education as a significant cultural event happening in public space, involving cooperation and acknowledgment of differences. The metaphors referring to culture space, which appear in the research materials, were quite unique: the cultural symbols indicated that non-formal education is natural as the symbols are wide-spread in the people's language use.

The current research findings provide a significant addition to the theoretically assumed characteristics of non-formal education: purposefulness, voluntary participation in learning, focus on the learner's development, possibility of choice, use of diverse

learning environments, the learner's responsibility (Colley et al., 2009; Coombs & Ahmed, 1974). Among the characteristics that appeared in our research, learner-centredness is worth to be mentioned separately: while in previous research the educational metaphors focused on the teacher (e.g. Cameron, 2003; Guilherme & Souza de Freitas, 2018), according to our research the learner and their support is in the centre of attention (see for comparison Knowles et al., 2015). In non-formal education the learner's responsibility is highlighted both in the effort and in the discovery subcategory, the learner is an autonomous and active contributor.

It is noteworthy that metaphors referring to oppression did not emerge in the practitioner's language use, although they are present in education discourse (Aava, 2010; Przybylska, 2009). Also no reference to economic discourse emerged in our research (though practitioners from economics sphere were present in the sample) with its central issue of commercialization of education and the teacher's role as a client attendant (Aava, 2010; Bjursell, 2016; Guilherme & Souza de Freitas, 2018). Such a result may reflect a revolutionary change both in educational sphere and in the society in general and is worth further research. The appearance of border area metaphors confirms the deep rooted conception of the opposition between non-formal and formal education on the one hand, and yet, on the other hand, demonstrates possibilities to combine and integrate these types of education. The door for such an action is *slightly ajar* (compare the innovation in education UNESCO, 2020), but only *sky is the limit* for movement in that direction.

Notes

[1] In this research a non-formal education practitioner is the person who conducts the learning process, is responsible for it and acts as a facilitator and creator of the favourable environment for learning and of the learning experience. This is the person who supports learning and self-development of adults in a purposefully created learning situation. (Adult Education Act, 2015; Põlda et al., 2021).

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Annex

Table. Categories of metaphors describing non-formal education and the number of metaphors

Main category	*Subcategory*	*Metaphors*
Process (64)	Journey (13)	riding a bike; hiking journey; adventure; painting/picture; bird/flight; descending the hill; coming out of the tunnel; journey; soaring up; work/working; creating societies; making bridges; thinking out of the box
	Creating a whole (12)	puzzle (2 x); black spots (on a big cat); Lego blocks; kaleidoscope; Rubik's Cube; little pieces; creating societies; making bridges; stained glass; finding good notes between pauses; triangle
	Discovery (12)	aha moments; adventure; groping (feeling one's way); open mind; rain forest/jungle; curiosity; tunnel; a door slightly ajar; adventure park; out of the frame; thinking out of the box; gives wings
	Spending time (9)	playing; intellectual play; adventure park; theatre; puppet theatre; museum; Dance Festival; Song Festival; dispelling boredom
	Cooperation (8)	school of fish; World Cleanup Day; company; creating societies; making bridges; finding good notes between the pauses; dialogue (2 x); Dance Festival; Song Festival
	Development (5)	flower; bird/flight; self-development; soul bird; educating oneself
	Effort (5)	bow; bow and arrow; doesn't become a deposit in the course of life by itself; work/working; contribution
Subject (20)	Creativity (14)	creativity; painting/picture; Dance Festival; Song Festival; theatre; puppet theatre; finding good notes between pauses; glass bead game; stained glass; Rubik's Cube; Lego blocks; puzzle (2 x); kaleidoscope
	Emotion (6)	fun/pleasure; condensed milk; beauty of the game; an opportunity to dream; dispelling boredom; open mind
Object (20)	Toy (8)	kaleidoscope; Rubik's Cube; balls; bow and arrows; puzzle (2 x); Dixit cards; Lego blocks
	Symbol (7)	Hermann Tower with Estonian flag; Dance Festival; Song Festival; soul bird; map of Estonia; theatre; museum
	Model (3)	model of the country; map of Estonia; miniature life
	Storage place (2)	storage box; treasure box
Opportunity (22)	Diversity (16)	Big layered cake; Dixit cards; colourful; school of fish; multicolouredness/multitude; a set of methods; rain forest, jungle; Lego blocks; Dance Festival; Song Festival; museum; company; stained glass; glass bead game; kaleidoscope
	Difference (6)	black spots (on a big cat); red fly agaric; clever cow; out of the classic learning form; tops; Hermann Tower with Estonian flag
Environment (24)	Open space (11)	out of the classroom; landscape; empty paper; World Cleanup Day; a broader view of life; image outside of a school lesson; out of the classical learning form; out of the frame; thinking out of the box; sky is the limit; rain forest/jungle
	Border area (8)	не мясо не рыба; opening/closing the door; tunnel; a door slightly ajar; door; sky is the limit; zebra; driving into (formal education)
	Cultural space (5)	museum; theatre; puppet theatre; Dance Festival; Song Festival

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Categories of distinction in programme planning

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Abstract

The paper provides an analysis of the categories of distinction seized by programme planners in adult and continuing education and the underlying reasoning arguments to reasoning them. The analysis of 14 interviews shows that in their target group orientation, programme planners make use of the categories gender, migration experience, age, educational needs and dis/ability. The categories of distinction are based on their attribution as individual characteristics, as characteristics for grouping individuals, as characteristics of shared expectations and as occupation- and employment-related characteristics. The findings point to a need for encouraging awareness and critical reflection about categories of distinction.

Keywords: Categories of distinction, programme planning, target groups

Introduction

Programme planners in adult and continuing education are expected to recognise heterogeneity among participants (Tippelt & von Hippel, 2018) and to take it into account when determining target groups in the course of developing educational offers (Robak, 2013; 2016). Heterogeneity is understood as social reality (Prengel, 2013; Walgenbach, 2017), and its recognition is considered a key perspective in the professional actions of adult educators (Tippelt & von Hippel, 2018). When focusing on specific goals, winning

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over participants, running a regionally specific needs assessment, or drafting programme descriptions, categories of distinction are used. Moreover, they are taken into consideration to define potential participants that may be addressed by the offers - hereafter called 'addressees' - as well as target groups formed by shared characteristics and therewith may support the consideration of aspects of heterogeneity (Robak, 2016; Fleige et al., 2018; Gieseke, 2018a). The term "category of distinction" is being used to refer to normative perceptions and the social constructedness of differentiations. The orientation towards and determination of target groups hint to the processes of differentiation applied in adult education programme planning (Robak, 2013; 2016). The processes of differentiating are essential for programme planners in adult and continuing education, and they lead to the question which categories are used by them when determining target groups. Whereas the determination of categories differences and the work with them commonly applied in programme planning, very little empirical research is available on the patterns of reasoning that emerge in the process of constructing such target groups[1].

Programme planning is understood as a complex process of alignment that is positioned inbetween various so-called "knowledge islands" (Gieseke, 2003). It is based in the configuration and negotiation of antinomies (von Hippel, 2011) and embedded in social, political institutional and organisational contexts, whilst the programme planners are asked to negotiate the interests and deal with the power structures in place (Cervero & Wilson, 1994). The positioning of programme planning comes along with the pluralist nature of adult and continuing education as an academic discipline (Gieseke & von Hippel, 2018). Programme planners find themselves at an intersection where the negotiation is influencing the planning process as well as its outcome, the programme itself (Caffarella & Daffron, 2013). On the one hand, promoting social participation is a key perspective in target group orientation (von Hippel et al., 2018). On the other hand, and aside from educational goals of adult education, programme planners must also meet the requirements of their organisations and their organisational environment, e.g. reaching certain target groups and ensuring a course's full capacity (von Hippel et al., 2018). Besides that, programme planners are asked to meet the societal requirement of promoting social participation amongst the participants, which, at the same time, is highly dependent on the participants' active participation (von Hippel, 2011). Not least, they must consider the individual expectations of participants that are incorporated in the target group orientation through anticipated needs of the participants (Gieseke, 2018b). Positioned at this intersection, programme planners negotiate the different functional logics of individuals, organisations, the environment, and society (Cervero &Wilson, 1994; Fleige et al., 2018; Egetenmeyer et al., 2019). Taking these aspects as a charged relationship for the programme planners in mind, this paper examines the question about which categories of distinction are negotiated by programme planners in adult and continuing education. What reasoning is being used to legitimate the construction of these categories of distinction? The paper aims to analyse the categories of distinction in programme planning, considering the latter as a field of conflicting interests between the needs of target group determination and the related processes of attribution.

The approach of target group orientation in programme planning in adult and continuing education is taking into account how programme planners are guided by categories of distinction when planning adult education programmes (chapter 2). The focus on differences as markers of distinction when determining target groups underscores the constructedness of categories that are based on processes of Othering

(chapter 3). Building on the results of a study obtained through a situational analysis of 14 interviews with programme planners in adult and continuing education (chapter 4), the categories of distinction used in the determination of target groups (chapter 5) are discussed against the background of how making programme planners aware of such categories of distinction may encourage them to reflect on their actions (chapter 6).

Categories of distinction and processes of Othering

Categories of distinction are connected to normative ideas, constructed differences and attributed differences. Normative ideas and its constructions refer to conceptions of normality (Ashcroft et al., 2013) that are also prevalent in adult education. They are evident in conceptions such as 'heterogeneity, social classes, milieus, addressees, target groups (women, elderly people, socially disadvantaged people, unemployed, people with dis/abilities, foreigners and migrants), educational equity, inclusion' (Robak, 2013, p. 185). Programme planners draw on these conceptions as didactical perspectives.

The underlying idea of the construction of categories of distinction is based on an understanding of Othering processes, drawn from postcolonial and poststructuralist approaches. Referring to Lacan (1968) the social fabric is characterised by a distinction between the "Self" and the "Other" wherein the "Other" as being different from the "Self" leads to distinctions that are expressed in categories. The latter hint to the attribution of identities of "Others", who are then labelled as individuals or groups. Building on Stuart Hall's (2002) conceptualisation of identity, the ascription of belonging people to an alleged group is a key part of Othering processes. As such, they involve mechanisms of inclusion and exclusion. Moreover, the process is influenced by a charged relationship between self-attributed characteristics and those that are ascribed by others. Categories of distinction as the presumed 'essence of individuals' (Robak, 2013, p. 185) have increasingly been discussed since the turn of the millennium (Lutz & Wenning, 2001; Baader, 2013; Walgenbach, 2017). In a sociologist and interactionist perspective, they emerge in interactions and are constituted in situation-based attributions (Zifonun, 2018). Given the background that programme planning is highly influenced by the determination of target groups and groups of addressees, the need for critical reflection on the action of labelling people as belonging to specific groups based on categories of distinctions becomes apparent.

Raising the awareness that categories of distinction consist of a constructed character points to the necessity for critically reflecting on how differences are connoted. The multiplicity of connotation varies and may for example reflect negative tendencies, such as deficits that might be addressed, or, for instance, positive tendencies, such as diversity being embraced, and likewise other connotations. In this effort, it is important to engage in ongoing reflections, both concerning the orientation towards a participants' orientation as well as concerning one's own position by critically reflecting the power structures in place. Critical reflection is also required to determine whether target groups are defined based on categories of distinction that are driven by dichotomies. Promoting social participation and a positive recognition of differences can be achieved by addressing different target groups and meeting their expectations. At the same time, a deficit-orientation must be problematised when critically considering the attribution of categories of differences. This leads to the question, which attributions and categorisations are evolving from differentiations made in programme planning processes? In adult and continuing education, these aspects are only partially researched, but are holding a

potential for further analysis, historically positioned between pedagogy of differences and intercultural pedagogy (Baader, 2013).

Methods and data basis

The present analysis of categories of distinction in programme planning is a follow-up analysis of the findings of a study (Kuhlen, 2021) that examines how programme planners use categories of distinction. It is based on the approach of a situational analysis by Clarke (2012) that is methodologically located as grounded theory after the postmodern term and makes use of cartographic mapping strategies in order to address complexities in social contexts (ibid.).

The aforementioned study analyses semi-structured interviews conducted with 14 programme planners in adult and continuing education. The underlying assumption is that the professional practice of programme planning is highly complex, a fact that is evident in, among other things, the mutual effects of different antinomies (von Hippel, 2011). In order to reveal processes of differentiation on the part of programme planners, the interviewer encouraged narrations, used dialogical sequences, and asked follow-up questions. The partially pre-structured interview guideline was supplemented by open-ended questions over the course of the interview to allow for an emphasis on process and dialogue (Witzel, 2000). The process of data collection and the process of analysis was accompanied by memos (Clarke, 2012).

The sample includes interviewees from the German states of Baden-Wuerttemberg, Bavaria, Rhineland-Palatinate and the Swiss canton of Aargau. Interviewees were recruited with the help of flyers and by snowball effect. With one exception, all interviewees have a university degree in education; twelve of them with a focus in adult education. At the time of the interview, they were employed at eight different institutions, including local public institutions, universities, Roman Catholic institutions and private for-profit continuing education providers. After 14 interviews, the data collection process was purposely ended since sufficient material for a detailed analysis was collected in order to meet the category characteristics to answer the research question proposed in the doctoral dissertation (Kuhlen, 2021) for which the data was collected.

In the scope of the underlying study (Kuhlen, 2021), the situational analysis, informed by methodological aspects of grounded theory (Clarke, 2012), was used to create a project map, illustrating processes of differentiation in programme planning.

For this purpose, the author (Kuhlen, 2021) analysed the elements of participants, instructors, organisations and programme planners themselves, as well as non-human elements such as the digital/printed programmes consisting of various courses. By determining the relationships between those elements, conceptual links were drawn in order to identify key social worlds (Clarke, 2012) that are crucial to the analysis of the situation. Within these social worlds, categories of distinction were constructed in different ways. The reconstructed attributions of the categories of distinction refer to the patterns of reasoning that inform differentiation processes in programme planning.

The present paper analyses these patterns of reasoning, focussing on target group orientation in adult and continuing education. By analysing processes of negotiation and alignment, the importance of differences as constructed and hence categories of distinction in programme planning emerges as the main result of the analysis. For the present paper, this methodological approach allows for a comprehensive view of the situation in terms of the construction of categories of distinction as it pertains to the identification of target groups. The results are then consolidated with respect to the

categories of distinction identified in the situational analysis. This consolidation shows how the problem is embedded in the identification of target groups. Using situational analysis as the guiding approach thus allows for identifying patterns of reasonings and reconnecting them to the discourse on the identification of target groups based on categories of distinction and the way they are embedded in programme planning. Drawn from an intersectional perspective, it is possible to reconstruct patterns of reasoning that go beyond the identification and attribution of individual categories of distinction. Therefore, the following chapter entails an analysis of categories of distinction while focussing on the identification of target groups as a key role in programme planning.

Categories of distinction in the identification of target groups in programme planning

Based on attributions of differences, the educational offers within a programme are (further) developed. The categorisations are created in line with a target group orientation and aim to create group-specific offers. Potential groups of participants are formed and the criteria for the development of educational offers are therewith sharpened. The categories of distinction reveal information about the process of attributing people to certain groups in the process of developing educational offers . These attributions are enabled by the actions of the programme planners. As a result, the work of programme planners involves assigning individuals and groups to different categories.

The various ways in which categories of distinction are differentiated suggest underlying patterns of reasoning that shape the prevalent distinctions in programme planning. Based on the results of the aforementioned situational analysis (Kuhlen, 2021), a closer look will be taken at five categories of distinction and their patterns of reasoning in the following chapters. A description of the attributions of categories of distinction (5.1) is followed by an analysis of the patterns of reasoning at work in this attribution (5.2) with respect to a target group orientation.

Attribution of categories of distinction

Reconstructing the ways in which categories of distinction are attributed mirrors the multifacetedness of how the categories of distinction are considered in programme planning. The categories gender, age and migration experience are addressed in a multiplicity of ways, indicating the importance that the interviewees assign to them in their programme planning. In addition, the attribution of educational attainment and dis/ability can be reconstructed from the interview data. Those categories of distinction are quite similar to the lines of difference already discussed in the current discourse (Allemann-Ghionda, 2013; Robak, 2013), being sex and gender, age, dis/ability, sociocultural affiliation and socioeconomic status. At the same time, previous analyses of these categories of distinction, such as gender- or migration-specific studies, have primarily focussed on each of the categories specifically rather than on their interrelations.

The prominent role of categories of distinction in programme planning varies in different contexts of programme planning. Interviewees' statements about the category of distinction **gender**, for example, appears to be strongly distinctive: 'to convince women and men of the virtues of the Academy' (interview 10, ll. 346, cited in Kuhlen, 2021; all subsequent citations from the same source unless otherwise noted). Regarding the category **age**, the distinctiveness is less pronounced. Target groups are referred to as 'children, youth, families, cross-generational', for example (interview 14, lls. 260-261.).

Target groups with **migration experiences** are described as 'participants who, yes migrants, who come to Germany' (interview 7, lls. 129-130).

Furthermore, interviewees also address another category of distinction, **educational attainment**, albeit less distinctively: 'this is for a very different group of participants […] a kind of educated bourgeoisie […] but I am unsure whether it is still possible to call a group by that name' (interview 10, lls. 169-174). In this case, interviewees qualify and reflect on their own construction of difference while also retaining it to define the group of participants. Likewise, the category **dis/ability** is less distinctively found in the interview data: 'we repeatedly see that we have people on board, including participants, who are special in some way […] and we also have people in all other areas who have some kind of disability' (interview 6, lls. 501-502). Again, this category of distinction is attributed primarily to participants. Given that these two categories of distinction are not found in sufficient detail in the interview data, they will not be taken into further consideration in the following analysis of this paper.

The reconstruction of the categories of distinction shows how target groups are differentiated and highlights their role in programme planning. The categories gender and age are good examples of how categories of distinction are used as a marker of shared expectations: 'I think that seniors simply want to stay active longer, that they are fitter and more enthusiastic than they used to be, and that they do not see themselves as the typical stay-at-home seniors; so courses for seniors are very popular' (interview 8, lls. 604-609). The target group of seniors refers to age as the category of distinction. The interviewee groups seniors as a target group for their specific educational offers, anticipating an increase in their general fitness and a desire for activities as their expectations. Contrasting the seniors' different levels of activity and problematising this view as stereotypical, the interviewee goes on to differentiate the alleged expectation of this group. By pointing out the great utilization of these courses, the development of target group-specific offers based on the category age is seen as a positive. The fact that categories of distinction are seen as markers of shared expectations is also evident when reconstructing another category of distinction, gender, which guides programme planners in developing educational offers:

> We start marketing a classical topic such as presenting or something like that for specific subgroups: how do I present as a project manager, how do I present as a buyer, how do I present for women et cetera et cetera […] we try to bring specific groups together to be able to better serve these specific expectations (interview 13, lls. 773-785)

By naming three target groups, the interviewee distinguishes between project managers, buyers and women in terms of their anticipated needs in the field of professional development. Women are identified as a target group based on gender as a category of distinction. This distinction guides the interviewee in their actions and informs the programme planners' development of educational offers. The distinction is justified by referring to group-specific expectations. This target group-specific attribution of potential expectations is reconstructed as an anticipation of needs, based on the theoretical distinction between needs (*Bedarfe*) and expectations (*Bedürfnisse*) (Gieseke, 2018b).

Patterns of reasoning for the attribution of categories of distinction

Four patterns of reasoning can be identified in the attribution of categories of distinction. These patterns provide information about the background on which categories of

distinction are used in programme planning in order to define target groups in the course of developing educational offers:

1. Categories of distinction as individual characteristics
2. Categories of distinction as characteristics for grouping individuals
3. Categories of distinction as characteristics of shared expectations
4. Categories of distinction as occupation- and employment-related characteristics

In the first pattern of reasoning, *categories of distinction as individual characteristics*, specific characteristics are attributed to individuals in order to distinguish them from other individuals. One example is the binary distinction between participants as men or women, for instance through linguistic distinctions, as well as the distinction between participants via individual characteristics such as age or migration experience. This becomes evident, for example, when participants are described as 'young Syrian men' (interview 11, lls. 508-509). This description refers to gender but also age and migration experience as characteristics of the described participants. Moreover, gendered attributions to individuals also emerge in gendered language: 'Here in Windland, it's unacceptable to speak of "Lehrer" [the generic masculine form in German]; mostly you will hear people say "Lehrpersonen" [the gender neutral form in German] or "Lehrerinnen und Lehrer"' [the feminine and masculine form in German] (interview 3, lls. 460-464). The distinctions reconstructed for this analysis reveal an orientation towards participants as individuals, which is evident in attributions of individual distinctions.

The second pattern of reasoning, *categories of distinction as characteristics for grouping individuals*, strongly builds on the first pattern and can be understood as a somewhat more collective assumption. Categories of distinction are reconstructed as group-specific characteristics, for instance as characteristics of target groups distinguished by gender: 'We started marketing topics exclusively for women' (interview 13, lls. 774-775). The same pattern of reasoning emerges with respect to age as a category of distinction: 'I think that seniors simply want to stay active longer, that they are fitter and more enthusiastic than they used to be, and that they do not see themselves as the typical stay-at-home seniors' (interview 8, lls. 604-608). In the context of programme planning, the second pattern of reasoning refers to the distinction of groups based on categories of distinction attributed to them—categories that are essential for determining target groups.

The reconstruction of the third pattern of reasoning, *categories of distinction as characteristics of shared expectations,* builds on the previous pattern. In the underlying process of differentiation, the element of anticipated needs is formed by imputing shared expectations of groups. This emerges as a pattern for reasoning the categorisation of groups, based on categories of difference.

> Typically, participants are mothers and their children; that is of course rather the social aspect of it […] how do I educate […] an adventurous course, but one in which participants are fathers and their sons […] experiencing nature together is the bait, so to speak, but what this is really about is a relationship, of course, fathers with their sons, or daughters, for all I care (interview 14, lls. 267-284).

In this example, programme planning is focused on a clear target group orientation based on the anticipated needs of women and men in their roles as mothers and fathers. This pattern of reasoning also emerges with respect to age: 'In the courses exclusively for seniors, I do respond to that by not putting a twenty-year-old instructor in front of them'

(interview 8, lls. 689-692). The interviewee explains to choose instructors based on the target group, which is defined as seniors, by the category of age. When looking at migration experience as a category of distinction, the adjustment of course contents is justified by the assumption of shared needs: 'Our programme recently also included hiking excursions for new inhabitants and refugees' (interview 10, lls. 703-704). Here, the anticipated need is based on the joint exploration of the regional surroundings.

The fourth reconstructed pattern of reasoning entails *categories of distinction as occupation- and employment-related characteristics*. When it comes to the attribution of categories of distinction, the data reveals manifold references connected to developing and maintaining occupations and employment. Women as a distinct group, for example, are assumed to have a need for leadership courses specifically for women: 'You don't want them to get the impression […] that leadership in Germany is frequently male […] but to experience freedom in this protected space, women among women, equals among equals' (interview 12, lls. 277-280). The target groups, previously defined based on anticipated needs, are thus assumed to have a particularly strong need for integration into jobs and the labour market. Age-based distinctions are made in this pattern of reasoning by referring to people's work experience: 'I see the positive side, the older ones in particular, who of course are more experienced and can share their experiences with the younger ones; the younger ones […] who come up with new ideas' (interview 11, lls. 482-485). Here, age as a category of distinction is connected in positive terms to different kinds of work experience. At the same time, this pattern of justification serves as the basis for anticipating occupation-specific needs with regard to migration experiences: '[…] explicitly for vocational school students with refugee backgrounds, actually more of a assessment of expectations with these vocational school students […] what kind of support do I need to graduate from this vocational school and to successfully complete my vocational training as well' (interview 5, lls. 362-369).

The extent to which these patterns of justification for attributing categories of distinction occur varies by category. The three categories of distinction gender, age and migration experience can be centrally reconstructed based on the interview data. They are used for determining target groups, for developing specific courses, and for choosing instructors to teach these courses.

The analysis of the patterns of justification shows that programme planners attribute anticipated educational needs to these target groups. The attribution of needs and the orientation towards them in programme planning processes includes the intention to help these groups improve their social participation. Social participation, in this case, refers to both educational participation and participation in the labour market through employment. Programme planners anticipate the need for social participation that is to be promoted and realised by participating in adult education courses. This means that processes of differentiation are based on patterns of justification that aim for increasing social participation. The goal is to support target groups and to enable education. In this process, participants are also expected to be responsible for their own active involvement by self-identifying and responding as part of a target group, by recognising their needs in that scope, and by attending courses that match the anticipated needs and their respective expectations as alleged members of those groups.

Awareness of categories of distinction as an incentive for reflection

The analysis of interview data shows that programme planners do reflect critically on the distinctions they use and the resulting categorisations. Thus, assumptions can be derived that there are opportunities for critical reflection on the risk that programme planners in adult and continuing education employ a deficit-based approach in their target group orientation. Given that the interviewees have been asked about their daily work as programme planners rather than the differentiation within their target group orientation, they show a strong ability for critical reflection, with some of them questioning their own constructions of difference during the interview. Despite this focus of the interviews, the aspect of social desirability cannot be ruled out as an influential factor for the data material. Nevertheless, the findings indicate an ability for reflection at the same time as raising the question about the importance that the interviewees assign to making those distinctions while reflecting on their own work as programme planners. The analysis of categories of distinction in programme planning raises various questions that call for further research: What is the role of organisational goals and requirements, such as making sure that courses are filled to capacity, when it comes to drawing on categories of distinction? Which societal factors prove themselves to be important in their interrelations with programme planning? How do the differentiations show in the programmes? And how does the intentional or unintentional use of categories of distinction relate to opportunities for professionalisation in adult education?

Raising these questions does not suggest that heterogeneity shall be ‘dealt with’ or ‘managed’. Instead, the use of terms, as if they were some kind of tool, is one of the key aspects that need to be reconsidered critically when thinking of categories of distinction in programme planning. A critical potential is taking on a greater significance in the fact that attributions of the Other are recognised as fluid aspects of identity. Rather than *managing* these aspects with the help of competences, attributions should be reflected critically on a permanent basis. The main problematic with the idea of *managing or dealing with something* is that differences are understood as statistical characteristics, for instance as predefined sociodemographic characteristics or as *dealing with something foreign* such as *foreign cultures*. If this assumption in the *management of differences* is understood as an expanded form of *intercultural competence*, Othering processes clearly emerge as the basis of target group orientation.

By reflecting on categories of distinction, a critical examination between target group and participant orientation can be encouraged and a negotiation of the attribution of needs versus a recognition of expectations can be addressed. Raising an awareness for attributions of meaning and hierarchisations that arise with categories of differences by reflecting those processes can lead to a sensitisation for making distinctions. As a result, planning processes in programme planning and adult education might become more conscious and therefore more sensitive to inequalities that may arise from the construction of differences.

Notes

[1] In the German context, there can be identified different concepts and argument of target group orientation which were mainly developed in the 1970s (Schiersmann, 2010; Siebert 2012). Arguments were e.g. homogenisation of learning groups), social-political orientation or bottom-up approaches. The concept is accompanied with critical reflection of a deficit attribution towards identified groups. In this paper, the term target group is understood from a didactical perspective, which can be seen as very common in adult education practice. According to Siebert (2012, p.111) target orientation assumes a "collective life situation" (translated by the authors, in German: "kollektive Lebenssituation"). Von Hippel et. al. (2019) argue that based on this assumption common educational needs and expectations are defined.

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Migrants' self-perception of technical skills and occupational realities: A case of Zimbabwean School- Leaver Migrants in Botswana

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Abstract

The level of technical skills affects the integration of migrants into the host country's labour market. This study investigated the relationship between Zimbabwean school-leaver migrants' self-perception of technical skills and occupational realities. A mixed method research design was used in this study and systematic sampling was used to select respondents for the study. Questionnaires were administered on 60 respondents to collect quantitative data whilst 19 respondents provided qualitative data using semi-structured interviews. Findings suggested that most low-skilled migrants from Zimbabwe faced several challenges including failure to secure formal employment, obtain work and residence permits because of their low- level technical skills and qualifications. This challenge further affects migrants' social integration and economic status in the host country. Findings also revealed that there are no strategies to provide skills to migrant labour to assist them to join the mainstream labour market and reduce their life challenges in Botswana.

Keywords: Challenges, competencies, informal sector, low-skilled migrant, school-leaver, technical skills

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Introduction

The level of migrants' technical skills and migration are intertwined as they affect migrants' integration into the host country's labour market and their economic prosperity (Sanz, 2018). Several scholars which include Bahl and Dietzen (2019), Geresu (2017), Mupinga, Burnett and Redmann (2005) refer to technical skills as those specialised hands-on skills and competencies needed to perform specific tasks, produce goods and solve existing problems. To equip learners with these technical skills, Zimbabwe included Technical Vocational Education and Training (TVET) curricula in general education at school level. The technical skills are meant to equip learners with elementary technical skills for self-employment after school, further training and to improve their employability (Mambo, 2010; Maunganidze, Faimau & Tapera, 2016). Despite the Zimbabwean government's efforts to invest in human capital to spur economic growth, school-leavers tend to migrate from the country on completion of high school (Mlambo, 2017). School-leavers migrate from Zimbabwe in search of employment and hope for better economic opportunities in the destination country. The question is whether technical skills acquired at school alone can sustain the livelihood of a school-leaver migrant in a host country? Although several studies reviewed labour migration in general, this study investigated the relationship between migrants' self-perception of their technical skills and occupational realities in Botswana.

Zimbabwean school-leavers have been migrating in large numbers into neighbouring Botswana starting from early 2000 (Kiwanuka & Monson, 2009). By 2009, an estimate of more than 40, 000 Zimbabwean migrants were staying in Botswana (Mlambo, 2017, p.14). Due to the nature of migration, many Zimbabwean migrants illegally enter, live and work in Botswana making it difficult to have a clear estimate of their numbers. An estimate of 26 000 unregistered Zimbabwean migrants are assumed to be living in Botswana currently. However, as of March 2021, Statistics Botswana (2021) reported that the majority foreign nationals with work permits in Botswana were from Zimbabwe at 1550 persons (45.1%) of total work permit holders in the country, and this figure mainly included skilled and professional Zimbabweans.

The 2012 population census in Zimbabwe revealed that, 36% of youths aged between 15-24 years formed 84% of the unemployed population (ZIMSTAT, 2012). The exact percentage of unemployed youths of the same cohort in Zimbabwe to date has not been ascertained but is believed to be beyond 70% of the total age group. This suggests that this cohort of youths were likely to migrate in search of employment and economic opportunities in other countries.

Gukurume (2018) argues that the informal sector remains the only alternative economic option for school leavers to engage with the unemployment crisis in Zimbabwe. Therefore, it can be noted that the major drivers of the young labour migration from Zimbabwe include, poor economy and protracted political problems that have resulted in reduced post-school employment and training opportunities, coupled with limited labour market options (International Organisation for Migration [IOM], 2016). On the other hand, Mlambo (2017, p. 14) and Crush et al. (2017) argue that school-leavers from Zimbabwe increasingly migrate into neighbouring Botswana probably due to proximity, social and family networks. The relative peace, value and stability of the Pula (P), the Botswana currency further attract the young labour migrants (Crush et al*.,* 2017) despite reception and everyday challenges.

Although Mlambo (2017) states that low-skilled migrants face several challenging occupational realities in neighbouring South Africa which has a bigger economy, this does not deter several low-skilled labour migrants from crossing into Botswana in search

of employment opportunities, which they find in the low employment ranks. This study investigated the relationship between migrants' self-perception of technical skills and occupational realities in Botswana. The results can be used comparatively in other parts of the world. Although this cohort of migrants did not receive specialised training after school, they however do engage in various forms of economic activities related to hands-on jobs for survival in Botswana (IOM, 2016).

Studies on migrant labour found that, the level and type of technical skills affect the degree of migrant's social integration, level and type of jobs they take up, their economic mobility, quality of livelihood, opportunities for further development of knowledge and skills (Sanz, 2018, p.21; Yian and Parker, 2017). Despite the anticipation for economic opportunities and better quality of life in a host country, Chiswick and Miller (2011) found that low-skilled migrants face numerous occupational challenges and may not realise the anticipated benefits of migration due to their low-level skills. To understand the low-skilled migrant's occupational challenges, this study investigated the relationship between migrants' self-perception of technical skills and occupational realities in Botswana.

According to Chiswick and Miller (2011), school-leavers who migrate with no specialised training in any trade are regarded as low-skilled migrants because of their limited technical skills, and are more likely to find work in low-wage jobs. The question is, what type of occupational challenges do low-skilled migrants face in a destination country? Studies in Europe by Constant (2014) and in the United States of America by Dadush (2014) found that, the relevance of migrants' low technical skills is determined by their ability to adapt to existing production technologies and their motivation to learn new skills on the job. Therefore, the relevance of migrants' low technical skills in a host country becomes relative especially where migrants take up jobs even in situations where there is unemployment amongst citizens. For instance, Dadush (2014), Bahl et al. (2019) and Crush et al. (2017) found that low-skilled migrants settle for jobs in the informal sector where jobs are precarious and do not have social security as compared to jobs in the formal sector. The European Commission [EC] (2018) notes that in Europe, school leavers of migrant background without relevant technical skills and competencies, have a higher risk of unemployment, poverty, and social exclusion. Sanz (2018, p.23) echoes that low-skilled migrants end up taking jobs in the insecure informal sector to sustain themselves and are more likely to face social integration challenges. The migrants' challenges can be due to the transferability challenges of technical skills acquired from one country with different norms and practices, to a different cultural setting of the host country's labour market. It is against this background that this study investigated the relationship between migrants' self-perception of technical skills and occupational realities in a host country.

It is, however, necessary to understand the Zimbabwean school TVET in terms of its content, structure and aims to appreciate the nature of the technical skills that migrants possess.

Zimbabwean School TVET System

Zimbabwe school TVET follows a Competency Based Education and Training Approach (Munetsi, 1996). The main thrust of school TVET in the country is to inculcate the right work attitude in learners towards trade related work, equip them with the knowledge and related practice technical skills of the trade (Coltart, 2012, p. 8; Mandebvu, 1996). The key aim is for school leavers to apply the acquired technical skills and knowledge to solve

problems they encounter in everyday life. School TVET in Zimbabwe is available from the last two grades in primary school through to university level and the TVET subjects are embedded in the general school curricula. However, not all schools offer the full array of TVET subjects due to a limitation of resources (Mupinga et al., 2005, p. 12). School TVET subjects include, Building Studies, Woodwork, Metalwork, Technical Graphics, Home economics and Agriculture, Music Art and Agriculture, Computer Studies, amongst others. These are examined at Ordinary (O) or Advanced (A) level, which are the two secondary school exit levels in Zimbabwe. Some schools offer National Foundation Certificates (NFC) from Form 3 to 4 (Coltart, 2012, p. 23). The NFCs are single subject courses which are more specialised than the related practical subjects offered at secondary school level. The argument about the NFCs at school level is that school level practical subjects are not doing enough to equip students with skills for employment and a more serious thrust in skills training is necessary (Commission of Inquiry into Education and Training [CIET], 1999). The NFCs are also meant to make secondary school curricula more occupationally oriented to enhance the employability of school graduates in most sectors of the economy and make further training easier.

The methodology section explains the mixed method research design used in this study by combining elements of qualitative and quantitative approaches in data collection and analysis. The discussion section interprets the findings and their implications. The results and conclusions bring to the fore, the occupational challenges faced by low-skilled Zimbabwean school-leavers who migrated to Botswana. The results helped to suggest recommendations that can help to reduce occupational challenges faced by low-skilled Zimbabwean school-leaver in general, and how the government of Botswana could benefit from migrant labour, in particular. A theoretical framework that guides the research is presented, as well as the review of literature on challenges faced by low-skilled migrants. The study was guided by the following questions:

i) What are the educational levels of low-skilled Zimbabwe migrants who are working in Botswana?
ii) Which type of technical skills do Zimbabwe school- leaver migrants possess for the labour market in Botswana?
iii) How relevant are the technical skills possessed by the school- leaver migrants for the job market in Botswana?
iv) What are the occupational challenges faced by Zimbabwean school-leaver migrants in Botswana?

Theoretical framework

The study is grounded in the relevance theory by Sperber and Wilson (1981). The theory asserts that relevance is interpreted from a social context, abstract cognitive and reflective thinking processes which are enhanced by educational intervention. Relevance theory was used in this study because it explains the extent to which inferences affect intentions. It was used as a guide to evaluate the relevance of migrant school leavers' technical skills to the job market in a destination country, and the challenges they face as low-skilled migrants. The challenges faced by the low- skilled migrants mirror the relevance of their technical skills to the host country's labour market. Technical skills which are task oriented and learnt at school can be perceived to be relevant if they are aligned to the realities of adult skills needs after school. The theory is often used in linguistics to explain pragmatic inferences and that communication which is psychologically realistic, and

empirically plausible (ibid). The relevance theory in this study, helps to explain the relevance of what is taught based on stated goals and objectives from school syllabi, and those skills needed for work.

Relevance theory acknowledges that humans have prospective intuitions and strive to find that meaning which fits their expectations of relevance in the mind. The theory suggests that in education, relevance is subjective to the expectations of the end user after a teaching and learning intervention and these expectations can be personal or functional. From one viewpoint, personal relevance at school level is when learning is connected to an individual student's interests, aspirations, and life experiences. Murinda (2014) argues that migrants perceive technical skills to be relevant if the skills enable them to get employment and increased income. From the other view point, curriculum relevance can be functional when migrants have the relevant skills to successfully execute the jobs they get to the satisfaction of employers (UNESCO, 2017). Relevance theory is therefore concerned with cost-benefit trade-offs; effort put in should yield relevance (Sperber & Wilson, 1981). The elements in the cost-benefit trade-off are resources put in, cost of processing effort and the gains assumed at the end of the process. School leavers expect acquired technical skills to enable them to find economic opportunities for survival.

Literature review

Challenges faced by Migrants- a Literature Review

It appears that low-skilled migrants face several challenges despite the call by United Nations' Sustainable Development Goal (SDG) goal number 10.7 which calls for "safe, regular and responsible migration through implementation of planned and well-managed migration policies to reduce inequality within and among countries" (United Nations, [UN], 2017). Despite the anticipation for better economic opportunities after migration, Crush et al. (2017, p. 13) posit that low technical skills hinder migrants' opportunities for decent jobs in the host country's labour market. As a result, low-skilled migrants' challenges emanate from their failure to secure decent jobs and residence permits in a host country since their skills may not be regarded as "scarce", specialised and functionally relevant to benefit the host country. Other common challenges include poor social networks, language problems and, poor social integration in the societies they live in (UN, 2017). It is also further observed by Fejes, Schreiber-Barsch and Wildemeersch (2020) that it is not only the inability to converse in local languages but also not understanding the cultural values of the receiving country that can pose greater challenges to labour migrants.

Lack of recognition of low educational qualifications and skills

Lucci et al. (2016) found that in Europe, for example, migrants with low skills and qualifications are more likely to find jobs in the informal sectors where the general rewards are generally low which in turn, will affect the quality of migrants' lives. In Africa, studies by IOM (2016, p.3) have shown that in Kenya about Somali low-skilled migrants, and those from Eritrea to Saudi Arabia, young migrants and refugees with low educational qualifications live in crowded camps and cannot access decent jobs. Study findings by IOM (2016); Mlambo (2017); and Pellizzari (2010) suggest that low-skilled migrants tend to take up those jobs which are not taken up by citizens to sustain themselves, especially those jobs which are menial and of low-level wages. In such

circumstances, migrants face further challenges of social integration, poor personal economic status and development.

Challenges to find jobs

Anatol et al. (2013, p. 25) found that migrants often rely on personal networks and family ties for the first jobs, and survival in the initial days in a receiving country. Thebe (2017) argues that personal networks help with information about job opportunities through referrals. For example, Pellizzari (2010) found that more than one third of low-skilled workers in Europe reported that they found their jobs through friends and relatives. In Italy, about 42% of low-skilled migrant workers indicated that they found their first jobs through personal contacts as compared to 31% of citizens (ibid). In another study, Konle-Seidl (2018, p. 23) notes that labour migrants who enter in a country without a job offer find it difficult to get jobs due to legal restrictions on the labour market, and rely on social networks to get their initial jobs. It is, therefore, more likely that people migrate to those countries where they have friends and relatives for better arrival reception.

In another study by Colussi (2015), findings suggest that migrants of the same nationality, religious background and speakers of the same language frequently refer each other to their employers leading to increased rate of arrival job offers to migrants. For instance, the same study accounted for 26% of non-Western migrants who got their first jobs in Denmark through social and personal contacts. In a similar study in South Africa by Mlambo (2017, p.14) findings suggest that, to a greater extent, Somali migrants are more likely to find jobs in companies aligned to people of the same religion or they would work alongside each other in the informal sector. However, both studies note that social networks build working cohorts which have negative effects on social integration of migrants, slow acquisition of local languages and new skills, reduced job search efforts to some migrants in so far that they may stay for a long duration without jobs, bound in the cohorts (ibid).On the same note, Heimo et al. (2020) found that amongst peers, the level of skills transfer depends on "mutual learning, a sense of peerness, and a low hierarchy in the group" (ibid). This suggests that low-skilled migrants can learn from each other in non-formal situations in the workplace.

Language challenges

The ability to speak local languages in a destination country has proved to be an important skill for migrants to overcome challenges of social integration, economic development, development of other new skills and, a major factor in placing a migrant into the labour market (Sanz, 2018, p. 23; Chiswick & Paul, 2014, p. 5). For example, Lochmann et al. (2018) established that there is a positive correlation between ability to speak local languages and probability of getting jobs in France. Similar results were noted in Germany by Chiswick and Miller (2011) and in the United Kingdom by (Dustmann et al., 2010). Therefore, the aforementioned studies suggest that migrants gainfully learn the local languages through social interactions in the communities they stay and at work. For instance, a study in France by Lochmann et al. (2018) revealed that in 2013 alone, 65% of migrants with very good French speaking and writing skills had jobs compared to 56% who had limited skills of the language. In the other years, statistics were at 59% to 43% in 2011, and 48% to 32% in 2010 on employability rate after language lessons (Colussi, 2015). This implies that, ability to speak a local language yields positive results on employability of migrants. In the UK Dustmann et al. (2010) found that ability to speak

English influences the migrant's market value in the labour market; in terms of productivity and level of income and, this could apply to migrants in other countries.

The importance of language proficiency in migration between Zimbabwe and Botswana was determined in this study. There are common ethnic languages between some tribes in the two countries, and English is the official language used for communication and doing business. However, Botswana has several native languages which migrants must cope up with in their job searches (Chebane, 2016).The challenges of not being conversant in Botswana native languages for school- leaver migrants were explored in this study.

Level of technical skills and migrants' jobs

Andersson et al. (2019) argue that the increasing number of low-skilled refugees' in Europe contributed to the growth of low paid jobs. The low- skilled migrants often take up those jobs which are mostly menial, temporary, and short term contracts in nature that are often shunned by citizens (Dadush, 2014; Campbell and Crush, 2012). In another study, Benach et al. (2011) found that low-skilled migrants find jobs more easily in the agriculture, food processing and construction sectors. These sectors require abundant manual labour but often, migrants with low skills have challenges of securing work permits because of their low human capital. Therefore, it can be argued that the level of technical skills impact on migrants' placement in the labour market in a host country with debatable effects on their economic prosperity. A survey on employment of low-skilled labour in Europe by Dengler and Matthes (2018) revealed that, on one hand, regulations of labour markets generally push people with low human capital to low-wage jobs. As a result, migrants in the low- skills category tend to have limited job mobility. However, Sanz (2018, p. 21) and UNESCO (2017b, p. 23) observed that, to a lesser extent, improved personal, job and informal social networks overtime make low-skilled migrants to learn new skills and occupy better jobs resulting in other reduced social challenges.

Several other studies by Segatti (2017, p. 18); Mlambo (2017, p. 14), Dadush (2014) and OECD (2017) indicate that low-skilled migrants take up even those jobs shunned by citizens and at times they work where their safety is compromised. For instance, the African Centre for Migration and Society [ACMS] (2017) revealed that foreign born migrants in South Africa are more likely to be employed in precarious jobs in the informal sector, on short contract and low- paying jobs where they are likely to be exposed to several challenges. Hence, this study investigated challenges faced by low-skilled migrants in Botswana.

Research methodology

The study was conducted in the South East district of Botswana which included Gaborone, the capital city of the country. This region was chosen because it covers the main economic hub in the country and several migrant workers would be found working in this region in various sectors. Other regions of the country have limited economic activities because of the dry weather conditions affecting the greater of Botswana. The study was conducted between February and September of 2020.

The researcher used a mixed method research design combining elements of qualitative and quantitative approaches in data collection and analysis in one research (Johnson et al., 2007, p. 124). The elements included viewpoints, data collection and

presentation methods, inference techniques for the broad purposes of breadth of understanding, and corroboration. Tieddlie and Tashakkori (2013, p. 11) argue that mixed method research design provides for triangulation of data collection and analysis methods. A systematic sampling design which is a mixed sampling design with characteristics of both probability and non-probability sampling methods (Kumar, 2011) was used to select participants from a target population of migrant Zimbabweans working in different job sectors including construction, farming, and domestic jobs. Probability sampling was used to select areas where the participants were to be drawn from within the region, and random sampling was done to get the exact participants for the research. Probability sampling was chosen as it afforded an equal and independent chance for all Zimbabwean migrant school-leavers in the chosen clusters to be picked for the study (Kothari, 2014; Kumar, 2011). Questionnaires were administered on 60 school leaver migrants and 19 responded to the interviews during data collection.

Questionnaires were used to collect quantitative data, whilst interviews collected qualitative data to allow narrative accounts to be heard and probing for further clarifications (Creswell & Plano Clark, 2007, p. 5). The questionnaires were in English comprising definite and predetermined items derived from the research questions and literature review. Some items of the questionnaire were close-ended whilst others were open-ended to invite the respondent to clarify experiences. The questionnaire had three (3) sections and thirty items (30). Section A had items asking for biographical data about the migrants. Section B asked for TVET subject(s) done at school, dates of migration, and economic activities migrants were engaging in Botswana. The last section C solicited for the occupational realities and challenges faced by Zimbabwean school-leaver migrants in Botswana.

The researcher hand-delivered the questionnaires with an introductory letter requesting respondents to answer and return the questionnaires. Where respondents requested time to answer the questionnaire, the researcher personally followed up to ensure maximum return of completed questionnaires. The questionnaire was tested for stability and homogeneity to ensure its reliability. To achieve this, the questionnaire was adjusted and re-administered with the same participants on whom piloting was done with the instrument as they were accessible to the researcher. To ensure validity of instruments, each research question was treated separately and the type of data the research question solicited for, whether qualitative or quantitative was first established (Cohen et al., 2007, p.133).

Interview guides were used to collect qualitative data for methodological and respondent triangulation. The guide had predetermined qualitative open-ended questions to get valid and reliable comparable primary data especially when participants were to give clear explanations of their experiences (Cohen et al., 2007). The guide helped the interviewer to have a smooth flow of questioning and recording during the interview, even after digressing when probing some questions for clarification. This helped in getting specific responses which were not likely to come out of a questionnaire, especially views and opinions (Creswell, 2007). The guide was given to the research participants ahead of the scheduled interview time to prepare responses, in some cases. Some of the interview were conducted in Shona, the native Zimbabwean language and later encoded to English. The purpose of the interview was explained first to seek consent and rapport with the interviewee and to get accurate data. For ethical reasons, permission was first sought to record the interview so that the researcher did not need to take notes during the interview. Interviewees were coded M1-M19 (M standing for Migrant) and the same codes were used to present the interview data results. Coding was done for ethical reasons as a way of protecting interviewees' anonymity and confidentiality.

Data analysis techniques for both quantitative and qualitative data were used concurrently since the mixed method design allowed this from data gathering (Creswell, 2007). Questionnaire quantitative data were analysed using descriptive statistics with the aid of SPSS. Narratives were used to analyse qualitative data.

Results

Since the study used a mixed method research design, data was analysed using both statistical and qualitative techniques concurrently. This was done to explain the inferences from the statistical data and relationships between responses to the research questions.

Migrants' bio data

The participants who responded to the questionnaire were 60, and the total number was dominated by males who were n=49 (81.7%) and n=11(18.3%) females. The findings suggested that there were more male than female Zimbabwean low-skilled migrants in Botswana. Statistics suggest that the low-skilled migrants were around 18 years by the time they migrated. This is implies that they migrated after completing high school at 16 years which is the exit age at Ordinary level and 18 years at Advanced level according to the Zimbabwean school education cycle (Coltart, 2012). However, it can be stated that the study did not achieve statistical representation of the low-skilled migrants in Botswana since there is no accurate number of this cohort of migrants. Several low - skilled migrants entered into Botswana are living and working in the country illegally and cannot be tracked (Mlambo, 2017).

Migrants' qualifications and their relevance

A question was asked to establish the high school qualifications of the migrants by the time they migrated to Botswana. An analysis was also done to check the relevance of the qualifications and technical skills migrants learnt as shown in the cross tabulation below in Table 1.

Table 1. Rating on relevance of migrants' qualifications with the job market

Qualifications	How do you rate the relevance of your qualifications with the job-market?			
	Relevant	Not Relevant	Not Sure	Total
Zimbabwe Junior Certificate	11	2	0	13
Ordinary Level	30	4	4	38
Ordinary level with NFC	3	1	0	4
Advanced level	4	0	1	5
Total	48	7	5	60

Findings in Table 1 indicated that most of the respondents completed "O" Level which is the lower high school exit point in Zimbabwe. Amongst those migrants with "O" level qualification, a few of them have an additional NFC qualification in different practical subject areas and, they indicated that their qualifications and skills were relevant to the job market in the host country. However, those respondents who had 'A' level high school qualifications and were fewer than those who did "O" level maybe because with 'A' level some school leavers enroll into universities, technical colleges or other professional courses other than to migrate (Munetsi, 1996). With only high school elementary technical skills, such migrants are regarded to be low-skilled (Chiswick & Miller, 2011).

It was necessary to find out how migrants perceived the relevance of the technical subjects they did to the type of jobs migrants engaged in to sustain their livelihoods in Botswana, and the results are in Table 2.

Table 2. Rating on relevance of subject technical skills with job market

Subject	Rating on relevance of subject technical skills to the job market			
	Relevant	Not Relevant	Not sure	Total
Woodwork	6	0	0	6
Building Studies	20	5	2	27
Technical Graphics	1	0	0	1
Agriculture	15	1	0	16
Food & Nutrition	1	0	0	1
Fashion & Fabrics	3	1	2	6
Computer Studies	0	0	1	1
Metal Work	1	0	0	1
None	1	0	0	1
Total	48	7	5	60

Table 2 shows that most respondents had done a TVET practical subject at school. Building Studies was done by most respondents, followed by Agriculture, Woodwork and Fashion and Fabrics alike. Interview results revealed that most schools were offering Building Studies and Agriculture maybe because the subjects did not require expensive training consumables and electricity, as such the subjects could be institutionalised even in remote rural settings (Misozi et al., 2013). Findings revealed that most migrants found the technical skills they acquired in the subjects to be relevant in the job market of the host country.

Sectors where low-skilled migrants worked in Botswana

Data in Table 3 below shows the subjects done by migrants with sectors where migrants were working, and the information helped to establish if the TVET subjects and technical skills learnt by migrants (see Table 2) were related to the job sectors they worked in Botswana.

Table 3. Subjects done by migrants with sectors where low- skilled migrants worked

	Job sectors where migrants worked					
Subject	Construction	Agriculture	Manufacturing	Domestic	Landscaping	Total
Woodwork	5	0	0	0	1	6
Building Studies	26	0	0	1	0	27
Technical Graphics	1	0	0	0	0	1
Agriculture	13	1	1	1	0	16
Food & Nutrition	1	0	0	0	0	1
Fashion & Fabrics	0	0	1	5	0	6
Computer Studies	1	0	0	0	0	1
Metal Work	1	0	0	0	0	1
None	0	0	0	1	0	1
Total	48	1	2	8	1	60

Table 3 shows that most of the low-skilled migrants were working in those sectors related to the subjects they had done at school that is, in the construction sector, followed by those working in domestic jobs, manufacturing sector and in agriculture related jobs, respectively. Therefore, results suggest that the low-skilled migrants were working in the construction sector where most people with skills from Building Studies and Woodwork worked.

Although the results revealed a lower number of migrants in domestic jobs, this does not suggest that the sector needs high skills. The low numbers can be because jobs in the domestic realm are difficult for migrants to obtain, however not because the jobs need high skills. Often job seekers and researchers lack access to enter the relatively private areas (Ibnu et al., 2021). However, findings by Ibnu et al. (2021) were that women migrant workers who work as domestic workers do not get good treatment from their employers as compared to native employees of the same skills level, which is a notable challenge in this sector. Further studies could be done to find out specifically why there could be fewer low-skilled migrants working as domestic workers in Botswana.

It was also necessary to find out the nature of contracts low-skilled migrants had by each job sector. Results are indicated in the cross tabulation shown in Table 4.

Nature of contracts for low-skilled migrants

The nature of contracts low-skilled migrants had, whether long or short term contracts and the sector where they worked are shown in Table 4.

Table 4. Nature of contracts for low-skilled migrants with job sectors

Nature of Work	Job Sector					
	Construction	Agriculture	Manufacturing	Domestic	Landscaping	Total
Fixed long term	2	0	0	1	0	3
Short term work	39	1	2	7	1	50
Project based	7	0	0	0	0	7
Total	48	1	2	8	1	60

Table 4 shows that most school leaver migrants were engaged on short term contract casual jobs yet a few had fixed long-term contracts. This larger number of migrants on short contract jobs worked in the construction sector which, by its nature, is a sector characterised by short duration and once-off jobs. Low-skilled migrants possibly and easily get jobs in the construction and agriculture sectors because the sectors generally require abundant manual labour on short durations. These jobs may be shunned by even those citizens with low job-skills. The agricultural sector in Botswana opens up for seasonal jobs of short durations in the vast cattle and food production farms, and tends to employ several migrant workers. The government of Botswana issues work permits for low-skilled farmworker jobs such as herd boys for as long as the applications are supported by the employers. The few migrants who are employed on fixed long-term contracts may have gained some recognised local work experience because of their long stay in the country. However, it was necessary to find out how the low-skilled migrants perceived the relevance of their technical skills to the jobs they were doing, their perceptions are shown in Table 5.

Perceptions on the relevance of technical skills acquired in the learning of TVET subjects at school in enhancing employment chances

This question was asked to obtain the views and perceptions of low-skilled migrants domiciled in Botswana on the relationship between TVET technical skills learnt in school (see Table 2) and the skills needed in the workplaces based on their experiences (RQ iii). Although respondents were asked to provide a rating from “Relevant”, “Not relevant” and “Not sure”, they were also given chance to elaborate on their perceptions on the questionnaire and through interviews. Ratings by the respondents are summarised in Table 5.

Table 5. *Rating on relevance of technical skills to available jobs*

Rating	Frequency	Percentage
Relevant	48	80.0
Not Relevant	7	11.7
Not sure	5	8.3
Total	60	100.0

In Table 5, data shows most of the respondents perceived the technical skills they acquired from school to be "*Relevant"* as they were able to be effective and accomplish their tasks. Murinda (2014) argues that migrants would perceive technical skills to be relevant if the skills enable them to get employment and increased income. According to Sperber and Wilson (1981), the relevance theory, indicates that humans acknowledge prospective intuition of relevance once there is meaning in what fits the expectation of practical relevance. From a functional relevance perspective, most of the school leaver migrants concurred that they could adapt and adopt learnt skills to take up economic opportunities to sustain their livelihoods in Botswana (Jeon, 2019). If respondents' views can be considered as a measure of TVET curriculum relevance, Lauglo (2006) posits that curriculum relevance is seen through external effectiveness if migrants can get and perform their work effectively. On the other hand, some respondents indicated that the skills were '*Not relevant'* whilst others were '*Not Sure' if* the technical skills from TVET subjects were relevant or not to the type of jobs they were doing. These responses can be linked to some low skilled migrants who may have learnt new skills altogether from their peers overtime when they had worked alongside each other but had not done a related TVET subject in school (UNESCO, 2017, p. 23).

Challenges faced by low-skilled Zimbabwean migrants in Botswana

The study sought to establish challenges (RQ iii) faced by low-skilled school leaver migrants who were in Botswana. The questionnaire had a provision for respondents to state at least five (5) challenges they faced. Some respondents wrote less, but some wrote more than the requested number of challenges on the questionnaire, but all responses were captured hence the varying frequencies. These challenges are summarised in Table 6.

Table 6. Challenges faced by low-skilled migrants

Problem	Frequency	Percentage
Lack of work/residence permit and arrest by police	45	75
Cannot work on big jobs	2	3.3
No payment after work	12	20
Limited power to negotiate high charges for jobs	7	11.6
Failure to register companies	2	3.3
Limited technical skills for complex jobs	7	11.6
Prolonged time with no jobs	26	39
Lack of money for food and accommodation	21	35
Language problem	3	5
Not being accepted by locals in communities	10	16.6
No access to hospital services	2	3.3
Unaffordable cell phone & internet bundles	45	75

Amongst several challenges shown in Table 6, most of respondents indicated that they had a major challenge of acquiring work and residence permits. For instance, some respondents said:

> **M2**: *I don't have a passport and any specialised training so it is zero chance to get a permit.*
> **M7:** *No employer offered to help me acquire a permit because of my low qualifications.*

A cross tabulation was done to check on the relationship of challenges with availability of work or residency permit. Table 7 shows these results.

Table 7. Migrant challenges and availability of residency and work permits

Challenges	Do you have a work or residency permit?	
	Yes	No
Lack of work and residence permit	0	13
Arrest by police for working without permit	0	13
No payment after work	0	5
Limited power to negotiate high charges for jobs	0	1
Limited technical skills for complex jobs	0	4
Prolonged time with no jobs	0	6
Lack of money for food and accommodation	1	12
Language problem	1	0
Unaffordable cell phone & internet bundles	1	45

Table 7 shows that most of the migrants in this cohort cannot secure work or residency permits and this challenge in turn results in a myriad of their occupational challenges. This challenge of failing to get work or a residence permit is compounded by the nature of migration, whereby several young migrants from Zimbabwe cross the borders into Botswana illegally through ungazetted points and are not registered (Mlambo, 2017). Often, these young migrants stay illegally in Botswana as they cannot afford to obtain passports at home due to challenging economic conditions and red tape. The lack of a valid passport to obtain a permit is yet another source of other migrants' social, economic, and operational challenges in the host country. Furthermore, several low-skilled migrants only have embodied skills with no paper qualifications to show as a requirement when applying for permits (IOM, 2018). Nevertheless, several low-skilled migrants without working permits get arrested and are deported when they are caught working illegally.

Interviews revealed that often, to avoid arrests by police, migrants depended on establishing good rapport with employers for protection and not disclosing their legal status as well as taking risks when working without permits. Some migrants preferred to work in areas not frequented by police, and relied on communication with peers through phone calls, WhatsApp, and Facebook about police movement. The following was said by some migrants:

> **M1 (construction):** *For the past 10 years, all people I worked for recommend me for other jobs. Employers protect us by locking us behind security walls and gates, bribing security officers, working at night and we work alongside locals as cover on some jobs.*
> **M18 (domestic worker):** *We rely on communication through social media to alert each other on police movements, if there are police raids, we don't go out for work.*

Some respondents indicated that they had limited negotiating powers when charging and doing quotations for jobs, whilst others were forced to charge less than what citizens could charge for the same jobs. Therefore, this implied that low- skills limited migrants in this cohort, were restricted to low paying small jobs as a compromise to support their livelihoods. The following was said by some of the respondents:

> **M8 (construction worker):** *People with projects just offer less money for a job, we end up taking the jobs because if I refuse my next brother will take it.*
> **M19 (domestic worker):** *In domestic jobs there are common unofficial rates that we negotiate around and some employers can offer if they have extra jobs and are happy with the way you work overtime.*

Despite migrants successfully completing their jobs, some employers reneged on paying for work done. Such employers would take advantage that the unregistered migrants cannot report such cases to the labour courts for protection since they do not have the right to render their services in the country without valid work or residency permit. At times they were arrested before they finished or got paid for work done.

Migrants also faced the challenge of prolonged non-working periods and they struggled to raise money for accommodation and food. Migrants ended up taking up any form of employment even the menial jobs not related to their experiences for payment. At times migrants depended on each other during the prolonged periods of unemployment. For instance, some respondents said:

> **M1 (Construction worker*):*** *We get small jobs for short durations, but at times we go for days and weeks with no work, it's difficult.*
> **M11 (Domestic worker):** *I have my clients where I rotate for cleaning the house and washing on agreed rates. These employers trust and pay me well on time.*

Since migrants often rely on personal networks and referrals by peers and previous employers, these may hinge on availability of such gadgets as cell phones, the ability to buy internet bundles to facilitate communication on social networks, and freedom to move around in search of jobs. At times migrants do not have the gadgets nor are able to afford to buy bundles to communicate. When asked how they got their jobs, the following were some of the responses:

M3 (construction worker): *Employers always refer us to their friends for the next jobs.*
M10 (domestic worker): *When I came to Botswana, my friend got me the first job and I also refer my brothers to possible which jobs I cannot do, especially the construction and other heavy jobs.*

Some respondents indicated that they had challenges of speaking local languages and this affected their job-search hence, prolonged durations without work and negotiation skills. Some communities in Botswana speak other different native languages other than the dominant Setswana, whilst Kalanga and Ndebele are dominant in the Northern region of Botswana which borders Zimbabwe (Chebane, 2016). Kalanga and Ndebele are also some of the native languages spoken in Zimbabwe, and Shona being the dominant language. Therefore, some migrants can be conversant with the Ndebele and Kalanga. Since this study was conducted in the Southern region of Botswana, in and around Gaborone the capital city of the country, Setswana is dominant and of course, with people who speak other native languages. Although English can be the common business language, not all migrants and citizens maybe so fluent. Languages spoken by migrants are in Table 8 and the perceived advantages of speaking local languages are summarised in Table 9.

Challenges of speaking local languages

The challenges of speaking local languages were explored and how this impacted on the livelihoods of low-skilled migrants. Local languages spoken by migrants other than English are shown in Table 8.

Table 8. Local languages spoken by school leaver migrants in Botswana

Local Languages	Frequency	Percent	Valid Percent
Setswana	37	61.7	61.7
Kalanga	10	16.7	16.7
Kalanga & Setswana	11	18.3	18.3
Ndebele	1	1.7	1.7
None	1	1.7	1.7
Total	60	100.0	100.0

As shown in Table 8, except for one, all other respondents could speak at least one local language in Botswana, and most respondents were conversant with Setswana followed by Kalanga, and yet some migrants could speak both languages. Ndebele, a common language spoken in both countries Zimbabwe and Botswana was spoken by the least number of migrants. The results suggest that migrants make an effort to learn local languages to facilitate ease of doing business. Migrants indicated that it was important to be able to speak local languages in a host country as shown in Table 9.

Respondents were asked to state if there were advantages from their ability to speak local languages. They were to choose either “YES” or “NO” and were asked to elaborate on their responses, results are in Table 9.

Table 9. Advantages of speaking local languages by migrants

Response	Frequency	Percent	Valid Percent
Yes	6	10.0	10.0
Yes- For Negotiating jobs	28	46.7	46.7
Yes- For Socialising	8	13.3	13.3
Yes- For communication	13	21.7	21.7
No	5	8.3	8.3
Total	60	100.0	100.0

Most of the respondents indicated that the ability to speak at least one of the local languages gave them advantages when communicating with locals during job search, negotiating payments, and social integration in the communities they were staying. The few respondents who did not see an advantage of speaking the local languages could be those who either migrated already speaking Botswana native languages or those who are now fluent in the languages and take it as normal. Therefore, responses suggest that the ability to speak native languages can expand the low-skilled migrants' socio-economic opportunities since they interact with native peers of low-skills who may only converse in local languages and not English. However, it is important for migrants to be able to communicate in English as they also meet clients/employers who speak English only, and it is the language they can use when purchasing materials in shops.

The study revealed that most low-skilled migrants were earning low wages, a little above the minimum wage in Botswana, and could not meet their basic needs. Although earnings for low-skilled migrants were low, Luckanachai and Rieger (2010, p. 5) found that overtime, migrants may get more jobs which can boost their overall earnings with increased stay in a host country due to improved social contacts and referrals. However, low earnings continued to further keep low-skilled migrants on the lower continuum of economic status despite the envisaged benefits of migration.

Conclusions

The study concluded that Zimbabwean school-leaver migrants possessed low-technical skills and the level of skills restricted these migrants to those jobs that are not complex. Findings revealed differences between Zimbabwean school-leaver migrants' self-perception of their technical skills and occupational realities they meet Botswana's labour market.

However, the low-skilled migrants perceived the technical skills they acquired from school to be relevant for the type and level of jobs they were doing. The study findings further suggested that most of the Zimbabwe low-skilled migrants' were reliant on less complex jobs in the construction, agriculture and domestic job sectors of Botswana on short term contract casual jobs where social security and wages were low. Therefore, findings suggest that low-skilled migrants tend to find work in the precarious non-formal sector.

On the occupational challenges faced by low-skilled Zimbabwean migrants, the study found that this cohort of migrants cannot secure work or residency permits because

of the low status of their skills which have no scarcity premium in the destination country. This challenge resulted to more of the low-skilled migrants' occupational challenges in Botswana. Some of the subsequent occupational challenges as a result of not having work or residency permits included persistent arrests by police, non-payment after doing jobs, limited power to negotiate competitive rates for jobs, not being conversant with local languages, prolonged time with no jobs and poor earnings.

To a limited extent, some of the occupational challenges were due to the ability to speak some the native languages where migrants sought jobs, although most migrants could speak at least one of the popular local language in Botswana that is Setswana or Kalanga. Most of the migrants agreed that the ability to speak a local language affected their social integration into the communities they lived in, finding jobs and other socio-economic opportunities. Low- skilled migrants were accused of bringing unnecessary competition to low skilled jobs which could be taken up by citizens with low-level skills. As such, the study concluded that the level and type of technical skills have a bearing on the occupational challenges encountered by migrants in a destination country. Low-skilled migrants face occupational challenges of regularising their stay, finding jobs, low socio-economic status, and poor quality of life in the destination country.

Whilst the research has valuable practical and social implications, it has some limitations. The research was done in one region of Botswana, which is characterised by fast growth of infrastructure and industries in construction and manufacturing. The geographic expansiveness of Botswana could not allow the researcher to cover other regions. The findings could not be generalised to other regions in the country because they have limited economic activities and lower numbers of migrants competing for jobs. However, there could be some other migrants working in those regions not covered by the research who could give valuable data for the research results to be generalisable.

For further studies, similar studies could be conducted in other regions of the country to establish the relationship between migrants' self-perceptions of their technical skills and occupational realities in the areas they stay. The research can also be extended to other countries like South Africa, which hosts many Zimbabwean school-leaver migrants and, for comparability of findings with other parts of the world experiencing the same phenomenon of low-skilled labour migration. For policy, the recommendations are that identified occupational challenges faced by Zimbabwean school-leavers can be used to realign school TVET curriculum competencies to the skills needed for work. The government of Botswana in particular, can benefit from migrant labour if they can come up with policies that can regularise the stay and working of some migrants.

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"Why *don't* they participate?" Reasons for nonparticipation in adult learning and education from the viewpoint of self-determination theory

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Abstract

The study deals with the perceived reasons for nonparticipation in adult learning and education (ALE), drawing on existing research concerning the motivation for lifelong learning, adult attitudes towards education, and the study of dispositional barriers. The aim of the study is to determine the subjective reasons/motivation of adults not to participate in ALE and what factors influence their nonparticipation. For this purpose, we drew on self-determination theory (SDT). Based on that we have created the research tool "Motivation to Nonparticipation Scale" (MNP-S), which measures three factors: extrinsic motivation, intrinsic motivation, and amotivation. The empirical research was conducted with a representative sample of adults (N = 943, age: 19 to 81 years) who had not participated in ALE. Contrary to theoretical assumptions of SDT, amotivated adults do not predominate among nonparticipants, with the main subjective reasons for nonparticipation based on intrinsic or extrinsic motivations.

Keywords: Attitudes to education, dispositional barriers, lifelong learning, nonparticipation in adult education, self-determination theory

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Introduction

One of the traditional questions in research on participation in adult learning and education (ALE) is that of why do adults participate? Since the 1960s many researchers have addressed this question (see, e.g., Boeren, 2016; Boeren et al., 2010, 2012a, 2012b; Blunt & Yang, 2002; Boeren & Holford, 2016; Boshier, 1971, 1977; Houle, 1961; Isaac et al., 2001; Mulenga & Liang, 2008). Within this extensive research, several tools have been validated, with various typologies of participants which can aid in understanding the subjective reasons behind participation in ALE.

Despite this extensive research and the documented benefits of lifelong learning (e.g., Antikainen, 2006; Psacharopoulos, 2006; Regmi, 2015), in most countries non-participants still outnumber participants (Desjardins, 2017). In some cases, they make up the vast majority of adults, a population referred to by Margaret Becker Patterson (2018) as the "forgotten 90%." In accordance with Sharan Merriam and Lisa Baumgartner (2020, p. 92), we therefore pose the question: Why do adults not participate? This remains one of the "biggest mysteries of adult education" (Merriam & Baumgartner, 2020, p. 96).

This question is typically approached in three different ways. The first one includes socio-psychologically oriented studies (e.g., Baert et al., 2006; Blunt & Yang, 2002; Kyndt et al., 2013a) based on the tradition of valence-instrumentality-expectancy theory (Vroom, 1964), and focusing on the attitudes of adults towards lifelong learning. Attitudes in the form of expectations and the significance of ALE are part of a complex process of decision-making regarding participation (Boeren, 2016, 2017). The scholarly literature comes to a conclusion that if adults do not consider education important or are not interested in it, they tend not to participate (Baert et al., 2006; Kyndt et al., 2013a).

The second approach explains the nonparticipation using the concept of barriers. In this respect, the research tradition initiated by Patricia Cross and her chain-of-response model (1981; see also Courtney, 1992, Darkenwald & Valentine, 1985; Rubenson, 1977; Valentine & Darkenwald, 1990) distinguishes the so-called institutional, situational and dispositional barriers that prevent individuals from participating in ALE. The occurrence of barriers is then linked to various structural factors which affect the unequal rate of these barriers within different social groups or countries (see, e.g., Rubenson, 2011, 2018; Rubenson & Desjardins, 2009; Roosmaa & Saar, 2017 Saar et al., 2013, Saar & Räis, 2017).

Regarding subjective reasons for nonparticipation, the so-called dispositional barriers are particularly important, including attitudes and self-perception (Cross, 1981, p. 98). In the case of these adults, nonparticipation is often related to the lack of motivation, indifference, fear associated with organized learning or insufficient level of skills for further education. According to Maurer et al. (2003, see also Patterson, 2018), individuals with lower levels of self-efficacy may find participation in ALE more difficult.

The third research line includes studies (e.g., Cincinnato et al., 2016; Dämmrich et al., 2014, 2015; Gorard & Selwyn, 2005; Robert, 2012) that address various microsocial factors - especially age, the level of education, gender and economic status. At the same time, microsocial factors are thought to influence both the individual motivation and opportunities for education and training.

In this study, we attempt to build on all three traditions to develop a theoretical and empirical dialogue among them. In this regard, our intention is to analyze three interrelated subjective factors affecting nonparticipation in ALE: (1) specific attitudes of adults (vis-à-vis the first approach above), which correspond to (2) dispositional barriers to education (the second approach), and how these factors are influenced by (3)

microsocial factors (the third approach). We believe that the unifying framework for such a dialogue may be self-determination theory, which provides the theoretical basis for our following empirical investigation.

By focusing on the reasons for nonparticipation, we do not deny the influence of structural factors (Desjardins et al., 2006; Rubenson, 2018). Therefore, we also take into account the effect of microsocial variables on the attitudes of adults. However, we also argue that inquiring into the subjective reasons for nonparticipation cannot be avoided, as this approach facilitates an understanding of why some social groups have certain attitudes towards ALE while others have completely different ones (Paldanius, 2007). In this context, the dispositional factors of nonparticipation have often been neglected in main international surveys regarding ALE such as PIAAC and AES. While these instruments are valuable in other ways, they do not contain enough items to provide convincing and detailed results regarding dispositional factors (Hovdhaugen & Opheim, 2018).

The aims and purpose of the study

The main goal of this study is to determine the motivation (reasons) of adults not to participate in ALE. What are their attitudes, which can also act as dispositional barriers to participation in ALE?

1. The first secondary objective is to determine the structure of this motivation on the basis of self-determination theory.
2. The second secondary objective is to determine the structure of nonparticipants on the basis of the prevailing reasons for nonparticipation in ALE.
3. The third secondary objective is to identify the main microsocial factors (age, gender, and highest level of education) that influence the prevailing reasons for nonparticipation in ALE.

Theoretical background and hypotheses

The theoretical basis of the study is self-determination theory (SDT), a concept formed by Edward Deci and Michael Ryan (2013, 2017) (Ryan & Deci, 2019), which today ranks among one of the most widespread theories of motivation. SDT provides conceptual apparatus that allows us to understand the reasons behind nonparticipation in ALE.

Several important arguments can be put forth in favor of the application of SDT in the field of ALE. First, it represents an integrative concept of human motivation which has been successfully used to investigate the involvement of adults in a range of activities which may be considered similar to ALE, such as sports activities, work behavior and health prevention (Deci & Ryan, 2017). Second, SDT has been used successfully for more than three decades to study the learning environment of children and adolescents (Nolen, 2020; Ryan & Deci, 2020). Third, SDT provides a rich set of research tools (e.g., Vallerand et al. 1993, 1994) that can be used to study motivation in ALE, thus complementing and expanding the currently limited number of such tools (Boeren, 2018, 2019). Fourth, a number of researchers (Boeren, 2016, 2017; Merriam & Baumgartner, 2020) in have argued for a more extensive use of SDT not only to understand individual

participation in lifelong learning, but also the relationship between ALE and the fulfillment of basic human needs.

SDT is based on the premise of three basic human needs individuals must fulfil to experience well-being: (1) competence, (2) relatedness, and (3) autonomy. Human behavior is connected with efforts to meet these three needs, or to eliminate the frustration caused by not meeting them for an extended period.The satisfaction of needs is put causally into action through the motivation of individuals (Ryan & Deci, 2000), including what "moves people to action, what energizes and gives direction to behavior" (Deci & Ryan, 2017, p. 13). Motivation is then internally differentiated according to the degree of control and autonomy of individuals. In this regard, a continuum can be plotted between autonomous and highly self-determined motivation, referred to as intrinsic motivation, and weakly self-determined behavior, which is characterized by amotivation and subsequent types of extrinsic motivation with varying degrees of internalization of external control (Howard et al., 2017; Ryan & Deci, 2020).

According to SDT, intrinsic motivation refers to activities that are performed merely for the sheer satisfaction of them. Typically, internally motivated activities are most often games, exploration, and other activities that people engage in to experience a feeling of self-fulfillment and satisfaction (Deci & Ryan, 2013, 2017). Competence and a high degree of internalization regarding the value of a certain activity are the central elements of intrinsic motivation, based on which individuals differ from each other in the degree to which they consider a certain activity to be interesting and internally satisfactory (Deci & Ryan, 2017, p. 117). Due to the high degree of internalization, this type of motivation is highly independent of external conditions..

As has been described by a number of researchers (e.g., Cross, 1981, Darkenwald & Valentine, 1985; Valentine & Darkenwald, 1990), ALE is not seen by many individuals as an activity which could lead to inner satisfaction and fulfillment, or provide a sense of self-competence. According to SDT (Gnambs & Hanfstingl 2016), this phenomenon can be expected especially in adults because a decrease in the intrinsic motivation to learn already begins in adolescence.

Extrinsic motivation is a highly heterogeneous category, one primarily associated with the instrumental orientation of people (Deci & Ryan, 2013, 2017). Therefore, it is usually saturated with external reward, social recognition, or avoidance of punishment. Compared to intrinsic motivation, it is much more dependent on situational conditions and external control. As a result, the various types of extrinsic motivation depend on the degree of internalization by the subject. For this reason, SDT distinguishes four subtypes of extrinsic motivation (Ryan & Deci, 2020): (1) extrinsic motivation with external regulation and the key role of external rewards and punishments; (2) extrinsic motivation with introjected regulation in which the individual places emphasis on being recognized by others; (3) extrinsic motivation with identification, which includes a conscious assessment of an activity, and (4) extrinsic motivation with integration. The last subtype comes closest to intrinsic motivation, since it is characterized by an internalized value of the activity which corresponds to the subject's own self-concept.

In the case of extrinsic motivation, ALE is not seen as an activity that leads to the fulfillment of the personal goals of adults, i.e., to gain some form of reward, for example in the form of pay increases, improved position in the labor market, or social recognition by friends or co-workers. Furthermore, it does not seem to help them to solve problems in their daily lives. In the context of ALE, these will most often be goals related to the job and are. most often associated with the extrinsic motivation to (not)participate in lifelong learning (Desjardins et al., 2006; Ure & Asslid, 2013). Based on the above-mentioned definitions, we formulate the following hypothesis (H1):

H1: Nonparticipants in ALE will show a greater degree of extrinsic motivation for nonparticipation than intrinsic motivation for nonparticipation.

It is typical for amotivation that adults refrain from a certain behavior and show no interest in it. Therefore, amotivation is most often manifested by feeling a lack of competence or a sense that the individual is being controlled by a certain activity (Deci & Ryan, 2013, 2017).

Van Petegen et al. (2015) in this context add that what may be considered by some to be the amotivation for a particular behavior may in fact be an expression or behavior in resistance to an activity that undermines individual autonomy, belonging, or a sense of competence. For this reason, Ellen Boeren (2016, p. 71) argues that amotivation is in fact the reason adults do not participate in lifelong learning. According to her, amotivated individuals may feel alienated from ALE due to negative experiences from the past, a conclusion many other authors have also put forth (e.g., Paldanius, 2007).

H2: Amotivation is the strongest factor of nonparticipation in ALE compared to the factors of intrinsic and extrinsic motivation.

The influence of microsocial variables on the motivation not to participate in ALE

A wide consensus has been reached in previous research regarding the influence of a number of microsocial variables on the motivation to not to participate in ALE. In this study, we will focus on the three most relevant variables: age, gender, and level of education.

According to various studies from primary and secondary education (Gillet et al., 2012; Scherer & Preckel, 2019), the intrinsic motivation to learn decreases with age, suggesting that the intrinsic motivation not to participate should increase with the age. This trend has also been depicted in several studies in the field of ALE (Brady & Fowler, 1988; Bynum & Seaman, 1993; Desjardins et al., 2006; Ure & Asslid, 2013). They have documented that in older age cohorts the number of adults who declare extrinsic motivation not to participate considerably decreases. This shift is likely caused by declining expected utility of education in professional life. Based on these findings, we formulate the next hypothesis (H3):

H3: In the dimension of intrinsic motivation not to participate in ALE will decrease in the category of 65+.

Gender-oriented research (Albert Verdú et al., 2010; Blais et al., 1989; Vaculíková et al., 2020) has shown a more frequent tendency of women to engage in learning activities for other than job-related reasons. Women reported more frequently intrinsic motivation for participation, while men indicated the predominance of extrinsic and job-related reasons. Nevertheless, this type of research has so far been primarily focused on the motivation to participation, and has not always provided unambiguous conclusions about the influence of gender (Dämmrich et al. 2014, 2015). On this basis, we formulate the following hypothesis (H4):

H4: In the dimension of intrinsic motivation not to participate in ALE, women will score higher than men, while in the dimension of extrinsic motivation, men will score higher than women.

Adults with higher level of education declare that they participate in ALE due to intrinsic motivation more often than subjects with lower level of education (Dæhlen & Ure, 2009; Illeris, 2006; Ure & Asslid, 2013). According to some researchers (Boeren, 2016; Paldanius, 2007; Rubenson, 2011, 2018), less educated adults consider any form of postformal education to be a "necessary evil," or are not interested in it at all. On the

other hand, highly educated adults see it more often as an "opportunity" for their self-fulfillment. Regarding these findings, we formulate the following hypothesis (H5) concerning the influence of education:

H5: In the dimension of intrinsic motivation not to participate in ALE, adults with lower education (up to ISCED3c) will achieve a higher score, while in the dimension of extrinsic motivation we assume a higher score in adults with higher education (ISCED3ab, ISCED5,6).

Methodology

Samples and procedures

To test the above-stated hypotheses (H1 to H5), we conducted empirical research that included data collection with a representative sample of adults from the Czech Republic. The data collection for the purposes of the survey occurred during August to October of 2018, and was carried out with the Computer Assisted Interview technique through a specialized agency. The final data set includes 943 persons who declared nonparticipation in ALE (in formal and nonformal education) in the last 12 months before the survey. The age of the respondents ranged from 18 to 81 years (average 51, SD=19). The structure of the respondents was as follows: 466 men (49%) and 477 women (51%). Out of these individuals, 177 (19%) had achieved basic education (ISCED2); 346 (37%) vocational education (ISCED3c); 275 (29%) secondary school education (ISCED3ab), and 145 (15%) higher education (ISCED5, 6).

Research tool

We used our newly developed research tool "Motivation to Nonparticipation Scale" (MNP-S), which was developed on the basis of a modified version of the Academic Motivation Scale - College version (AMS-C-28) questionnaire, introduced by Vallerand et al. (1993) to research the motivation for nonparticipation in ALE. This tool was originally used to examine motivation to participate in formal education. We were inspired by AMS because it works with all subtypes of motivation described by SDT, and because it is closest to the area of ALE in terms of the focus of its items. As part of the modification of AMS-C-28 for the purposes of our research, we maintained the structure of individual factors in accordance with SDT. However, we changed the wording of the items to fit better to ALE. At the same time, we reformulated all the items to focus on the reasons for not participation. The applied questionnaire contains a total of 29 items (see Annex 1), which in connection with SDT focus on the key dimensions of motivation.

Motivation not to participate in ALE was measured by answers on a 7-point scale, where 1 = *statement does not describe the respondent's reason at all*, and 7 = *statement fully corresponds to the respondent's reason for nonparticipation*. The controlled independent variables for testing our hypotheses related to microsocial factors (H4 to H6) were gender (0 = *male*; 1 = *female*), 3 age categories (0 = *18 - 30 years*; 1 = *31 - 64 years*; 2 = *65 - 90 years*) and 3 categories of education, where 0 = *elementary or secondary not allowing entry to tertiary education* (ISCED 2 - ISCED 3c); 1 = *upper secondary allowing entry to tertiary education* (ISCED 3ab), 3 = *tertiary* (ISCED 5, 6).

Data analysis

Regarding our initial secondary aim, we examined the item structure of the tool using exploratory factor analysis (EFA). As we assumed an interconnection of factors, we applied oblimin rotation. As a statistically and substantively satisfactory procedure, we adopted a three-factor solution, the structure and parameters of which, including reliability, are contained in Appendix 2. We also focused on a descriptive analysis of the resulting factors and their mutual correlations. Based on the findings, we performed a cluster analysis using the K-Means Cluster procedure, by means of which we managed to define three specific clusters of ALE nonparticipants. Finally, we focused on modeling the relationships among the variables using regression analysis in which the dependent variables were the factors of intrinsic and extrinsic motivation for nonparticipation in ALE while the predictors included microsocial variables listed above. EFA was performed in JASP version 14.1, other analyses using IBM SPSS software version 25.

Results

Based on the EFA results, we created a three-factor model of reasons for nonparticipation in ALE which encompasses intrinsic motivation, extrinsic motivation, and amotivation. We reduced the number of items originally included in the questionnaire from 29 to 13, which led to the purification of the final solution and the achievement of reliable factors explaining the high percentage of variability (see Appendix 2). The strongest factor (F1 - intrinsic motivation) is saturated with 5 items and explains 41% of the variance. The next factor (F2 - extrinsic motivation) is also saturated with 5 items and explains 27% of the variance, while the third factor (F3 - amotivation) is saturated with 3 items and explains 19% of the variance. The overall rate of the explained variance is 87%. The resulting scales have good internal consistency for all factors, with Cronbach's α ranging between 0.839 and 0.993.

The correlation between the factors and the basic descriptive statistics is shown in Table 1. We identified a strong negative relationship between amotivation and the extrinsic motivation not to participate (r_p = -0.629), as well as a negative correlation between intrinsic and extrinsic motivations (r_p = -0.197). Conversely, the correlation between amotivation and intrinsic motivation is essentially zero (r_p = -0.042). From the descriptive results, it is clear that in the case of nonparticipants in ALE the extrinsic motivation is the strongest, the intrinsic motivation is slightly weaker, and amotivation is the weakest.

Table 1: *Correlation and the basic statistics of the factors*

	F1	F2	F3	Mean	SD
F1 – Intrinsic motivation not to participate	1	-.197**	-.042	4.803	2.391
F2 – Extrinsic motivation not to participate	-.197**	1	-.629**	5.106	2.007
F3 - Amotivation	-.042	-.629**	1	3.886	1.939

**. Correlation is significant at the 0.01 level (2-tailed).

Based on the results presented so far, we were able to verify the hypotheses H1 and H2. Hypothesis H1 is accepted on the basis of a paired t-test (t = -2.728; df = 942; sig = 0.006), with the difference between the extrinsic and intrinsic motivations showing as statistically

significant. Nevertheless, the applied measure of substantive significance (Cohen's d, -0.089), which indicates a substantively weak difference. On the other hand, H2 must be rejected, as respondents manifested amotivation with the weakest intensity compared to the intrinsic and extrinsic motivations. We reject the hypothesis without applying inferential statistics, as the descriptive results are completely in contrary to the hypothesis.

Based on the cluster analysis, we identified three groups of nonparticipants according to the predominant type of motivation not to participate in ALE. Summarized in Table 2, the results show the proportions of the clusters and the average values achieved in the three monitored factors.

Table 2: *Clusters of nonparticipants in ALE according to the prevailing type of motivation*

Factors of motivation	Cluster		
	C1 – Rejectors (n = 413, 44%)	C2 - Opportunists (n = 322, 34%)	C3 – Doubters (n = 208, 22%)
Intrinsic motivation for nonparticipation	6.49	1.54	6.50
Extrinsic motivation for nonparticipation	6.37	5.77	1.56
Amotivation	2.35	4.15	6.53

The first cluster (C1 - Rejectors) includes the largest group of nonparticipants who showed a strong level of intrinsic and extrinsic motivation for nonparticipation in ALE, and a very weak level of motivation. The next cluster (C2 - Opportunists) is composed of adults with weak intrinsic motivation, strong extrinsic motivation, and a medium level of amotivation. The last and smallest cluster (C3 - Doubters) includes respondents who possess a strong level of amotivation and intrinsic motivation as well as, conversely, a very weak extrinsic motivation not to participate in ALE.

Table 3: *A model for intrinsic motivation not to participate*

Predictors		B	Std. Error	Beta	t	Sig.	VIF
(Constant)		4.729	0.160		29.641	0.000	
Gender	female vs male	-0.028	0.114	-0.006	-0.245	0.807	1.000
Education	ISCED3ab vs ISCED3c or lower	0.418	0.131	0.079	3.199	0.001	1.081
	ISCED5,6 vs ISCED3c or lower	0.045	0.165	0.007	0.275	0.784	1.087
Age	31-64 vs 18-30	1.375	0.163	0.288	8.451	0.000	2.030
	65-90 vs 18-30	-2.261	0.173	-0.444	-13.074	0.000	2.022

To achieve the last partial goal while also verifying hypotheses H4 to H6, we performed a regression analysis focused on the intrinsic and extrinsic motivation not to participate. In both cases, a check of multicollinearity was included (VIF <5, i.e., in accordance with the general recommendations for all predictors). The results of the analysis are included in Tables 3 and 4.

Table 4: *A model for extrinsic motivation*

Predictors		B	Std. Error	Beta	t	Sig.	VIF
(Constant)		5.026	0.180		28.000	0.000	
Gender	female vs male	0.053	0.128	0.013	0.416	0.677	1.000
Education	ISCED3ab vs ISCED3c or lower	0.409	0.147	0.093	2.781	0.006	1.081
	ISCED5,6 vs ISCED3c or lower	0.411	0.186	0.074	2.212	0.027	1.087
Age	31-64 vs 18-30	-0.458	0.183	-0.114	-2.500	0.013	2.030
	65-90 vs 18-30	0.315	0.195	0.074	1.620	0.106	2.022

The model for intrinsic motivation ($F = 163.376$; $df = 5$; $p < 0.005$; $R^2 = 47\%$) shows that the respondent's age has the most fundamental influence. The respondents aged 18 to 30 years are the reference category. Compared to this category, middle-aged adults (31 to 64 years) show a higher level of intrinsic motivation by about 1.4 points on a seven-point scale. On the contrary, older people (65 to 90 years) indicate a significantly lower level of intrinsic motivation, by about 2.3 points, compared to the reference group. Another difference was found in the comparison of educational groups, in which respondents with secondary level of education (ISCED3ab) manifest 0.4 points more than the reference group of participants with lower level of education (ISCED3c or lower). At the significance level of 0.01, the other results appear statistically insignificant.

The model of extrinsic motivation ($F = 7.744$; $df = 5$; $p < 0.005$; $R^2 = 4\%$) explains the weak proportion of variability, which may be due to the nature of this type of motivation, for which other external variables probably may play a role. The results show that the level of education is statistically significant. Individuals with education at the ISCED3ab level show a 0.4 point higher level of extrinsic motivation not to participate than adults with a lower level (ISCED3c or lower). In the case of the other predictors, the results are statistically and substantively insignificant.

Based on this analysis, we accept H4, as the score regarding the intrinsic motivation not to participate in ALE decreases significantly in the category 65+. H5 was rejected because gender difference are not statistically and substantively significant. Finally, we reject H6, as no statistically significant differences are shown between groups of people with low (ISCED3c or lower) or high (ISCED5,6) education in intrinsic and extrinsic motivation.

Discussion

Motives for nonparticipation in ALE

This study aimed to examine reasons for not participating in ALE. Consistently with premises of SDT, we found that adults do not participate due to three basic motives: (1) intrinsic, (2) extrinsic motivation, and (3) amotivation. All types function as strong dispositional factors for nonparticipation.

As for the autonomy of these factors, the starting points of SDT (Deci & Ryan, 2017; Ryan & Deci, 2019, 2020) were partially confirmed, as we found a negative correlation between intrinsic and extrinsic motivation and amotivation and extrinsic motivation. In contrast, the correlation between amotivation and intrinsic motivation was zero. The likeable cause of this empirical proximity is that these factors are empirically measured

by items that dominantly focus on the meaningfulness of ALE (see Appendix 2). In the case of amotivation, adults question the meaningfulness of ALE as such (e.g., "I don't know what it could bring me."). In the case of intrinsic motivation, the reasons for nonparticipation are lack of self-fulfillment and self-satisfaction ("The offered further education does not allow me to learn things that really interest me."). Although the degree of internalization of control is different in each of the factors, the respondents do not perceive them as important, as they both refer to the meaningfulness of organized learning.

Furthermore, we did not find significant differences in extrinsic motivation based on the degree of internalization of control. The factor analysis did not show that the different subtypes of extrinsic motivation were separate factors. Respondents understand them as a set of external reasons for not participating in ALE. To sum up, these reasons are seen as a totality indicating the absence of external pressure, whether it be pressure from the labor market, the employer, or the family, or whether it is their own self-concept and internalization of the value of ALE. In the light of the current literature on SDT, these findings are not surprising, as the assumptions regarding the autonomy of individual motivation has already been pointed out by some studies (Gagné et al., 2014; Kyndt et al., 2013b; Van den Broeck et al., 2013).

Contrary to what could be expected according to some authors (Boeren, 2016), it turned out that the strongest reason for nonparticipation is not amotivation, but extrinsic motivation. In this regard, we confirm the evidence provided by the numerous researchers (Boeren & Holford, 2016, Desjardins, 2017; Rubenson, 2018; Ure & Asslid, 2013) who stressed that adults do not participate in ALE mainly because it does not brings benefits to them in terms of goals fulfillment or the affirmation of their own self-conception.

Typology of nonparticipants

We also dealt with the typology of nonparticipants, which allows us to address the question of why adults are not motivated to participate in ALE based on their subjective attitudes. Through a cluster analysis, we identified three main groups:

1. *ALE rejectors*. These adults have both very strong intrinsic and extrinsic motivation. The group has the most negative attitudes towards ALE and is also the most numerous (44% of the respondents). Respondents in this group are convinced that ALE is an activity in which they do not find self-realization, and it does not help them to realize their goals and meet the expectations of others.
2. *Opportunists*. This is the second largest group (34% of the respondents). These are actors who do not participate predominantly due to extrinsic motivation. ALE is not perceived as a means to improve or secure their job position. At the same time, they consider organized lifelong learning to be an activity that either threatens their self-conception, as it may reveal deficiencies in their knowledge and skills, or it is not required of them by their family or employers.
3. *Doubters*. This group includes adults who have not only a strong intrinsic motivation not to participate, but also the strongest amotivation. This is the smallest portion of the respondents (22%). It is characteristic for them that they doubt the meaningfulness of further education, both for their self-development and in terms of the importance of ALE itself, which explains their indifference to it.

In terms of microsocial characteristics of individual groups, it is interesting that the "rejectors" include mainly people with higher education (ISCED 4-6) aged 30 to 64. According to the assumptions of the existing literature (Boeren, 2016; Desjardins et al., 2006; Rubenson, 2018), most of these adults should want to be involved in ALE, i.e., due to a higher level of education and a more positive experience with it, more educated people have a better predisposition for ALE. However, in the case of highly educated nonparticipants, we can see a sharp refusal to participate In the social context of our respondents, this is probably due to the mismatch between their qualification requirements and current requirements in the Czech labor market. This is also evidenced by the fact that more than 30% of university graduates feel overqualified for the work they perform (Koucký et al., 2014). In addition, according to the results of the AES2016, the share of people who previously participated in ALE but do not plan to continue their education fell sharply (Kalenda & Kočvarová, 2019).

The "opportunists" mostly include adults over the age of 60, with lower secondary education (ISCED 3). The opportunistic therefore correspond to the older age groups of the Czech population, in which people with a secondary level of education predominate. The high incidence of extrinsic motivation not to participate is logical for them, as ALE cannot effectively help them to improve and/secure their job position. In addition, adults in the older age groups show a higher level of apprehension to education and a lower level of expectation by others that they should continue to be educated (Merriam & Baumgartner, 2020).

Finally, the cluster of "doubters" is dominated by middle-aged adults with a lower level of education (ISCED 2-3). The high incidence of actors with these attitudes towards ALE is in line with previous findings (Boeren, 2016; Desjardins, 2017; Illeris, 2006; Rubenson, 2011, 2018) showing that low-educated adults very often describe feelings that ALE is meaningless in their lives as well as sense of alienation associated with it.

To conclude, our analysis offers a different typology of nonparticipants as compared to that previously presented by Valentine and Darkenwald (1990, see also Darkenwald & Valentine 1985), who formulated a typology of five groups of nonparticipants based on: (1) personal problems; (2) lack of self-confidence; (3) price of education offered; (4) lack of interest in organized education, and (5) lack of interest in available courses. Our three-factor typology focusing on the dispositional factors of nonparticipation partially overlaps with the Valentine and Darkenwald´s typology in terms of the lack of self-confidence and the use of a cluster of subjects who are not involve due to lack of interest in organized education and available courses. While the factor of lack of self-confidence partly coincides with the extrinsic motivation not to participate, the factor of lack of interest in organized education is related to our concept of intrinsic motivation and amotivation. Despite these similarities, our typology not only shows that individuals have more varied motives influencing their reasons for not participating, but also points out the social determinants of their decision-making.

The role of structural factors

The last secondary objective was to identify key microsocial factors influencing the prevailing reasons for not participating in ALE. In the case of the influence of age, we confirm certain findings from previous studies (Brady & Fowler, 1988; Bynum & Seaman, 1993; Ure & Asslid, 2013). In this regard, we found that intrinsic motivation decreases significantly among people aged 65+. The decisions of adults in older age cohorts about participation in further education are determined by extrinsic reasons.

According to the data, women do not manifest differences in intrinsic or extrinsic motivation in comparison to men. Thus, the differences in reasons for participation in ALE that other studies have revealed (Albert Verdú et al., 2010; Blais et al., 1989; Vaculíková et al., 2020) do not express the same logic regarding the motivation not to participate. One reason for this result may be that nonparticipants see in ALE opportunities for self-realization and satisfaction to a much lesser extent as compared to participants. We should add that other studies using gender as a variable also show inconsistent results (Dämmrich et al., 2014). In this case, the impacts of this variable is mediated by both the structure of the welfare state and the gender culture in a particular country (Dämmrich et al., 2015).

Contrary to theoretical assumptions (Dæhlen & Ure, 2009; Illeris, 2006; Ure & Asslid, 2013), we did not find the significance of education on reasons for not participating in ALE. This is probably because in highly educated adults external reasons for nonparticipation are very often associated with internal reasons for nonparticipation. In the Czech Republic, the reasons go hand in hand with skill mismatches, as mentioned above. In low-educated respondents, the reasons are accompanied by a significant effect of amotivation, which plays a vital role in this social group and reduces the influence of the purely intrinsic motivation.

Implications for practice

In addition to the theoretical conclusions, our findings also have interesting implications for policy in this area. Beyond the recommendations formulated by other authors and international policy papers (Desjardins, 2017; UNESCO, 2019, 2020), we believe that the motivation of nonparticipants should not be understood uniformly, as motivation is much more differentiated both in its sources and in terms of social occurrence. We should therefore individualize measures to support motivation for ALE regarding the motivational profiles of nonparticipants.

In the case of "doubters" about the meaningfulness of ALE, it is necessary to promote further education more as a valuable activity that can significantly enrich adults and bring them benefit not only in the job-related but also non-job-related areas.

In increasing the interest of "opportunists" in ALE, policy measures should be designed towards creating rewarding possibilities to motive adults to engage in further education. These may not only be opportunities for vocational training, but also for free-time, civic activities and community education, which may be particularly relevant and useful for older adults.

Limitations and directions of future research

One of the main limitations of the presented study is its exclusive focus on subjective attitudes towards ALE. Factors involved in the final decision to participate are much more complex and operate on several levels (Baert et al., 2006; Boeren, 2016, 2017), including situational and institutional factors (Cross, 1981; Darkenwald & Valentine, 1985; Rubenson, 2018; Rubenson & Desjardins, 2009). It is necessary to take into account other types of obstacles in the form of situational, institutional barriers, or various models of the welfare state and skill-production regime, all of which directly and indirectly affect the formation of the cluster of nonparticipants in the case of ALE "rejectors."

While our results may seem to challenge some claims of the proponents of SDT (Deci & Ryan, 2017, 2019, 2020) regarding the cultural universality of sources of

motivation, the findings were undoubtedly influenced significantly by the unique socio-cultural environment of the Czech Republic, where the empirical research was conducted. We know from comparative surveys that the Czech Republic, together with other post-Communist countries and the countries of southern Europe, form one of the regions with the highest occurrence of dispositional barriers (Roosmaa & Saar, 2017). As a result, these barriers may be felt much more strongly.

Two directions for future studies might follow from these limits: a more detailed examination of the interaction of reasons for nonparticipation in ALE and their situational and institutional determinants, and an international comparison of the motivation for nonparticipation. Either or both research tracks would shed light on socio-cultural factors of reasons both for and against participation.

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The author declares no potential conflicts of interest with respect to the research, authorship or publication of this article.

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The transformative dance of the crisis to resignify social educational work: auto-ethnographical reflections on a cooperative enquiry in Northern Italy during the COVID-19 pandemic

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Abstract

This contribution proposes an autoethnographic reflection on a cooperative enquiry involving social workers, volunteers and family members of people with intellectual disabilities in Northern Italy. The author, a social worker and doctoral student, recognises the complexity of her own positioning and reflects on the educational work that takes place in the social sphere, on the risks connected to a technocratic logic and on critical, and transformative possibilities offered by the crisis. The author proposes a systemic reflexivity that challenges the dominant discourses, connects the micro, meso and macro levels and promotes different ways of knowing. The dynamism of the body, linked to the author's experience in the field of contemporary dance, becomes a symbolic way to decolonise the posture of social workers and open it up to the transformative potential of a sensitive, conscious and incorporated social educational work.

Keywords: Bodily dinamism, cooperative enquiry, COVID-19, crisis, social work, systemic reflexivity

Introduction

I am a social worker and I am in charge of design and innovation in social education for people with disabilities in a social cooperative in Lombardy, Northern Italy. I am also a third-year PhD student in “Education in Contemporary Society”. I am doing a workplace

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doctorate that is based on an agreement between my company and the university starting from a need or problem arising from the field.

In this contribution, I will present an autoethnographic reflection (Adams et al., 2015) on the educational work that takes place in the social sector. To do so, I will refer to a cooperative enquiry (Heron, 1996) that involved myself and a group of social workers, volunteers and family members of adults with disabilities in the area where I work.

First, I will contextualise my contribution, rooting it in my personal and professional experience and I will then try to build a connection between the meso and macro levels of social educational work. Next, I will explore the concept of crisis as conceived by complexity theories (Morin, 2016; Alhadeff-Jones, 2021) and I will investigate its critical and transformative potentials, starting from the cooperative enquiry carried out during the months of the pandemic crisis. The narrative material I interacted with, my field notes, and excerpts from my research journal, become objects of autoethnographic reflection and suggest a further way of interpreting the data based on corporeal and aesthetic sensitivity. The bodily dynamism connected to my experience in contemporary dance is proposed as a possible transformative metaphor for the professional posture of the social educator.

Beyond the usual choreographies in social educational work

> We were very concerned about the situation. We were the largest social cooperative in the area, with over thirty-three years of experience. Yet, we felt several alarm bells were ringing. Local public authorities and families were asking for more. (...) It was as if the wind was changing. Some parents of young people with intellectual disabilities, recently released from school, did not want to enrol their child in standard socio-educational centre. Others were critical of activities that did not take into account the age of their children. Others were concerned about their children losing the learning they had acquired at school. (...) We felt we were being pulledin many directions, but internally it is as if the mechanism capable of setting in motion a real transformation has not yet been triggered.

This narrative extract is a recollection from my research journal. In it, I explore the feelings that had led my decision to start the PhD. It does not claim to "outline a context". On the contrary, I intend to try to contextualise the educational work that operates in the social sphere, attempting to con-textualise levels and meanings from a specific observational perspective, my own (Von Foester, 1982).

Without the identification of a context nothing can be understood; however, there is a dimension of power and risk in any contextualisation (Formenti, 2018). Indeed, the art of contextualising always carries the question: "What happens if I change my posture or something unexpected happens?" (ibid.). In the above extract I refer to ‘alarm bells’: they can be seen as ‘a difference that makes a difference’ (Bateson, 1979) in the relationship between me, services, families and local public authorities. These differences seem to bring a new rhythm to the complex web of relationships. What does not yet seem to emerge is meaning.

Let me take a step back. I started working in social cooperatives in 2006, after obtaining my degree in Clinical and Community Psychology. Following my graduation, I realised that the clinic was not my path and instead I was interested in community social work. I started off as an educator in services for people with disabilities managed by the social cooperative where I currently work.I delved into the history of Italian social cooperatives that, in the 1980s, succeeded in creating innovative social services starting

from the needs and goals of the territories that had generated them (Berzacola & Galante, 2014). Over time, the services have become the subject of national and regional laws and social cooperatives have made considerable efforts to adapt to the demands of these regulations (ibid.).

In services for adults with disabilities, there has been a progressive classification and standardization of the needs of people with disabilities followed by the definition of specific professional services. The segmentation of interventions and the bureaucratisation of practices have led to little consideration being given to the life history of people, their developmental trajectories, their wishes and aspirations. Moreover, the professionals' continuous training has mainly focused on the acquisition of observational and operational tools based on a technical-instrumental rationality that has flattened the educational work, reducing its ability to read complexity.

This growing bureaucratisation of social educational practices has affected not only the Italian context but also the international one. It has led services to place excessive emphasis on instrumental responsibility. This has generated approaches that have sought to validate the wisdom of practice (Fook, 1999; Parton & O'Byrne, 2000) but has also highlighted potential risks of oppression (Freire, 1972; D'Cruz et al., 2007). All this has confirmed and increased the gap between professionals, holders of technical knowledge, and users, who are increasingly deprived of speech and power to address the important issues in their lives.

The reductive and technocratic vision of social educational work risks tightening the game between the parties and confirming the power relations present in society (Foucault, 1975). Using the narrative extract above, the 'alarm bells' are as if they have interrupted the usual relational choreographies to introduce unexpected variations. I trace back these choreographies to what Mezirow (1991) calls ‘habitual patterns of action’. However, I feel the metaphor of choreography is closer to a systemic view of social educational action. Indeed, choreography presupposes someone who imagines, improvises and composes sequences of movements, alone or with others; it presupposes dancers who embody and interpret, each in their own way, the choreography; it presupposes a scenic space that is never neutral and that constrains and offers possibilities for movement; it presupposes a whole, a 'scenic body' that emerges from the previous elements. Finally, the choreography always takes on new meanings in the relationship with the significant gaze of each spectator.

Transferring the metaphor to my professional field, the educational action that is contextualised in the social sphere is a complex dance of interacting parts (Bateson, 1979). The usual choreographies of social educational action often bring with them premises that aim to make the unexpected familiar. From this perspective, disability can be seen as an unexpected personal experience which makes the person experiencing it socially unexpected. The process of progressive bureaucratisation and standardisation of practices, and its attempt to make the unexpected familiar, tightens up the dance between the parties in rigid choreographic schemes which colonise the imagination (Latouche, 2003) and reduces the image of the other to stereotyped codes and canons which are reinforced over time and hinder a lively listening and reciprocal recognition (Honneth. 1996).

The alarm bells and the sensation of ‘feeling pulled in all directions’ that I refer to in my research journal is as if the usual choreographies had been thrown into crisis and their rhythm interrupted.

Exploring evolutionary and transformative ways in the crisis

> After many years, I am back at university, but I am profoundly different now. Today I have fifteen years of work experience, I am married and a mother of two. I wonder how this affects my work. I feel the responsibility of my position and the need to find a connection between the demands and expectations of my working environment and those of the scientific community. In between there is me as. a learner, my enthusiasm, my concerns. It is not easy to find the right balance and I feel entangled. There are personal aspirations, my desire to be useful to my colleagues, families and the people with disabilities who I interact with every day. And then, the fear of not having enough time to dedicate to the PhD, the guilt for the time I take away from my family.

In this narrative excerpt, I find the feeling of 'being pulled in several directions'. This is compounded by a sense of entanglement, where multiple elements of my personal and professional life overlap, throwing the very rhythm of the research into crisis.

The crisis ran through the whole research process. It affected my personal experience, as a worker-student, wife and mother of two, my work context; it manifested with the 'alarm bells' from families and local public bodies, and then also the wider global context, with the arrival of the COVID19 pandemic. According to Morin (2016):

> there is no sector or problem that is not beset by the idea of crisis: capitalism, society, couples, the family, values, youth, science, law, civilisation, humanity... But this concept, as it has become more generalised, has been emptied of meaning. Originally, ‘krisis’ means decision: it is the decisive moment in the evolution of an uncertain process that allows a diagnosis to be made. Today crisis means indecision. It is the moment in which, together with a perturbation, uncertainties arise. (ibid., p. 21, translation mine)

The Greek root 'krinein' unites the word 'critic' and the word 'crisis'. Originally, crisis meant ‘to order, to separate’ and also ‘to classify, to arrange, to organise, to decide and to judge’ (Alhadeff-Jones, 2010, p. 480). At some point, crisis lost its decision-making quality that led from uncertainty to certainty. Similarly, the concept of 'critical' no longer coincided only with the capacity for judgement and discernment. In social educational work, for example, we often speak of ‘critical incidents’, as events that interrupt the predictability of habitual actions that had worked until then. Critical incidents are thus events that put one in crisis, but also occasions for reflection, where they allow one to return to the breaking point and understand what did not work.

The crisis can be seen as an event, where one focuses, in retrospect, on the factors that generated it, or as a process, where it is recognised as a product of cumulative tensions and dysfunctions (Roux-Dufort, 2000; Morin, 2016; Alhadeff-Jones, 2021). Its outcome is not necessarily evolutionary: it can be reabsorbed into a return to the status quo. However, the crisis also brings with it the characteristics of evolution. Alhadeff-Jones (2021) considers crisis as a transitional experience in which there are flows that need to be represented, understood, anticipated, contained and accompanied.

Starting from the recognition of the transformative potential of the crisis, I wondered which ways of crossing it would allow the negative features of complexity, given by disorder and uncertainty, to dance with the positive ones, given by the common texture in which the one and the multiple, the universal and the singular, order, disorder and organisation are bound together (Morin, 2017). ‘The best way out is always through’, goes the line of a poem by Robert Frost (Frost & Lathem, 1969).

I chose to use a cooperative enquiry methodology (Heron, 1996) as a way to connect both sides of complexity and to promote an holistic knowledge in my workplace. Cooperative enquiry is a type of Action Resarch that goes beyond data collection and

analysis and that is used to sustain change in social action, 'with and for people, rather than on people' (Reason, 1988, p. 1), Heron and Reason (2001) wrote:

> In co-operative enquiry (…), all those involved work together as co-researchers and as co-subjects. Everyone is involved in the design and management of the inquiry; everyone gets into the experience and action that is being explored; everyone is involved in making sense and drawing conclusions. (…) All the active subjects are fully involved as co-researchers in all resarch decisions – about both content and method – taken in the reflection phases. (ibid., p. 180)

The research process followed an emergent and, at the same time, deliberated design. The arrival of the pandemic in Italy, a few months after the beginning of my doctoral studies, generated an interruption of the ordinary activities of the services in my territory, a sense of disorientation in social workers, volunteers, people with disabilities and their families, improvisational actions in the constraints and possibilities offered by the situation and a reorganisation of social educational actions in new and unusual ways (Cuppari, 2021a).

The prolongation of the pandemic emergency over the months made me and my colleagues aware of the need to find ways to inhabit uncertainty but also to reflect in systemic way (Jude, 2018; Formenti & Rigamonti, 2020) on the premises underlying the usual choreographies that, until then, had characterised the social educational work of the services. What differences and choreographic variations were brought about by the crisis? Which variations could have become evolutionary and transformative ways of professional postures and choreographies linked to the social educational work of these services?

In this contribution I will try to explore possible ways of answering these questions. To this end, I have selected and related the narrative, autoethnographic and ethnographic material collected during four different research-training courses carried out in the territory in which I work together with social workers (Cuppari, 2021b), coordinators (Cuppari, 2021c; Cuppari, 2022a), volunteers and family members of people with intellectual disabilities attending social educational centres or involved in independent living projects (Cuppari, 2022b). Some participants took part in more than one research-training course, others only in one. The courses were carried out between October 2020 and July 2021.

For these paths, we followed a method called 'spiral of knowledge' (Formenti, 2017); it is based on complex, layered, shared knowledge and a recursive proceeding of stages: authentic experience, aesthetic representation, intelligent understanding and deliberate action (ibid.). Authentic experience is based on embodied sensoriality. Aesthetic representation contextualises learning against the changing scenery of metaphorical and abductive thinking (Formenti, 2018). Intelligent understanding composes a satisfying and shared theory from the emergence of a Collective Mind that conceptualises and composes information and definitions. Finally, deliberate action is an educational, social and political action that creates new contexts and is guided by the principle of enaction (ibid.).

In all of these pathways, the use of cooperative enquiry methodology enabled participants to become communities of research (Heron & Reason 2001) and practice (Wenger, 1998). The sharing and co-construction of a participatory pact constituted an important moment of negotiation of meanings around expectations, questions and research objectives. The validity of the research was guaranteed by the recursive proceeding of reflection and action and the process continued until saturation, as established by the participants/co-researchers. For the analysis of narratives collected during the meetings, I referred to the dialogical approach proposed by Merrill & West

(2009). In it, subjects are encouraged to think of themselves as active participants in interpreting and making sense of narratives, as partners in a learning relationship.

My complex positioning in the field, as researcher but also social worker, necessitated rigorous attention to the taken-for-granted assumptions present in me and in the cultural community of social workers that I was a part of (Adams et al., 2015). For this reason, I also described and analysed my personal experiences with the purpose of understanding cultural experiences of social workers. I journaled and recorded my insights and experiences during the research process and I documented my thoughts, feelings and questions. During the research-training meetings, I wrote field notes and memos and I used them to promote a process of meta-thinking (Crittenden & Woodside, 2007). It allowed me to develop awareness of my prejudices and to be open to data that opposed my preconceived ideas (McGhee, Marland, Atkinson, 2007).

The following reflection attempts to look again at the set of research-training paths carried out and to tune in to them through a sensitive and aesthetic way that has drawn on my experience in contemporary dance. From this operation words have emerged that belong to the bodily dynamism of choreographic research and composition and that I believe can enrich the lexicon we usually use to describe social educational action.

Dancing the crisis to resignify social educational work

My relationship with dance has been discontinuous and has changed a lot over the years, accompanying me through the different phases of my life: ballet in childhood, modern dance in adolescence, and then contemporary dance and dance theatre in adulthood. Today, dancing is for me not only a way of expression and personal communication, but also an artistic and performance outlet: for ten years I have been part of a contemporary dance group that has produced several choreographic productions.

According to Bateson (1991) every living being embodies its own constitutive metaphor, ‘our own metaphor’, which is the metaphor that we are and that is one with what we know. This metaphor is indispensable for us to live, it gives meaning to what happens, to interactions with others and with the context (Formenti, 2017). Through this shift in context, thought constructs itself, creating connections that show similarities but do not eliminate differences.

While the metaphor of dance and my experience in choreographic research and composition have provided a way to explore the transformative potential of crisis in the context of social educational work, I am also aware of how each metaphor simultaneously illuminates and obscures. Metaphors, in fact, are always partial: they offer a linguistic space that can be inhabited through creativity, which highlights certain aspects without exhausting them in an explanation (Bella et al., 2014).

Starting from the re-reading of the material relating to the four training research paths, I tried to come into sensitive contact with the data collected: I took notes of my feelings, opening my imagination also to autobiographical memories and building connections between my personal and professional experiences and those shared by the participants. Our ability to listen is modulated by the openness of our senses to the world (Le Breton, 2006). In some moments I also allowed my body to move. Allowing the body to act teaches one to move from one area (cognitive, affective, symbolic) to another, forcing one to see oneself more globally from several points of view (Gamelli, 2011).

The result of this sensitive approach to research data has allowed me to bring attention to three possible strategies of crossing and transforming social educational work starting from the experience of the crisis. These strategies can be traced back to some

techniques and awarenesses that are widely used in the field of research and choreographic composition in contemporary dance.

Micro level: falling to feel the 'weight' of one's vulnerability

> How do you do it? What is the horizon now that the tsunami has hit us? How can we create a new way of thinking about welfare and social educational work? How can we do it if certain paradigms have collapsed but a new culture is not ready?

I still remember these questions uttered by a manager of my cooperative during the first exploratory enquiry (Cuppari, 2021a). Even now, they take the form of real disorienting dilemmas (Mezirow, 1991); a 'tsunami' that destroys everything. When everything collapses, there is only one dominant direction: the fall. This transience affected not only the organisational level of services but also the professional posture, as expressed by this coordinator:

> Each of us had to deal with the fear of contagion. (...) We saw how much we were like them in this situation. The role of the educator went beyond the usual tasks. There was a closeness given not by the role but by all being in an emergency situation.

The verticality of the role therefore had to give way, at least temporarily, to a horizontality brought about by the emergency and shared by operators, volunteers and families.As the crisis continued over the months it accentuated the feeling of precariousness, in addition to the fatigue of being in an uncomfortable position, in constant dialogue with the developing situation. Another coordinator says:

> This emergency forces us to see things from other points of view, we need to reinvent ourselves. (...) I feel a bit drained (...) and tired. So sometimes I say to myself: 'I will go with the flow'.

The postural geometry imposed by the crisis has not allowed social workers to place themselves on the axis of verticality, but rather according to multiple contextual, contingent, intermittent and sometimes even random directions (Cavarero, 2013). The idea of a subject who supports himself, and denies his own vulnerability and condition of dependence, is counterproductive (Butler, 2004).

The first transformative way I see in the crisis is the possibility of a professional posture that renounces the fixity and verticality of the role and becomes aware of its own transience and weight. Below is a narrative excerpt from my own bodily exploration of this theme:

> I am lying on the floor and my attention goes to the points of contact with the ground. The solids, the voids. The ground supports me. I feel the breath, its undertow. I feel the fluids of the body. I am still, yet I am in full movement. I feel like a body in free fall, saved by this hand that holds me, the floor, that invites me to dance. I turn my head to the right and my knees fall to the left. (...) I hang, I sway, I dance on the edge of gravity. The dance continues on my side, my hands become levers to carry me to my seat. The head is heavy. I can choose to leave weight or add tension. Rolling, sliding, jumping, falling to the ground take place. Everything is connected: I touch and am touched by the ground, I move a shoulder and the pelvis responds. I am one, I am multiple. I am in continuous transformation.

Leaving a habitual posture can be a challenging transition, as the quote from the last coordinator reminds us. However, being aware of one's caducity also allows one to explore professional postures that are more flexible and able to correspond (Ingold, 2015) to the context. It is a temporary and provisional renunciation of the vertical plane that allows one to change direction, wait and recover energy. This awareness is a critique of that form of problem solving which renounces to stay in the uncertainty and is often present in social educational work.

Verticality evokes an idea of autonomy, like the toddler who stands up and starts walking. The autonomy of the toddler who takes his first steps is, however, an autonomy that is aware of the risk of falling. Within a reductive and technocratic vision of social educational work, the professional often considers himself or is considered an expert, who knows everything. Yet, even the professional exists in relation to someone he takes care of and who relies on him and his competence. How can there be an educator without an educand? Verticality, then, is not a posture that manifests itself in vacuum: it is possible starting from a relationship between the force of gravity, which invites us to fall, and our resistance to it, through the thrust of our feet.

Falling can be an accidental event, as in the case of a pandemic that disrupts the usual organisation of socio-educational centres, but it can also be an exercise to be pursued. In the training of the contemporary dancer much time is spent in exploring the infinite ways of falling and reaching the vertical plane. In social educational work this can translate into a shift from mastery in understanding others to a politically bold personal responsibility and cultural humility (Fisher-Borne et al., 2015). Recognising one's own transience is thus the first step in embodying a more conscious and dynamic verticality, constantly in relationship, first and foremost, with the ground that sustains us.

Meso level: disequilibrating power relations through dissonance and displacement

> That is it for now. I take up some of the participants' reflections and read out a quote from a scholar. It talks about addiction and disability as universal conditions that can arrive unpredictably in people's lives and should therefore be seen as part of a "common welfare". I had thought of this closing sentence as a passage that could help practitioners, volunteers and family members to find common ground despite their different perspectives. It seemed to me a good way to close the meeting. After the reading we started to say goodbye. X, Y's sister (a person with a complex disability), intervened and exclaimed: "This is utopia, you know that, don't you? In the evening when the door of our house closes, we are alone as families. I will still continue to be at these meetings but that is what I think". I remain speechless. We are all tired and it's late. (...) Over the last few days I've been thinking a lot about X's words and the sense of loneliness her words evoked in me. A discordant note compared to the premises that have led me to choose that quotation.

This excerpt is taken from my research journal and refers to a research-training meeting with social workers, volunteers and family members of people with intellectual disabilities involved in independent living projects. In it I recount the final moment of that meeting, the reaction of a participant, the sister of a person with complex disabilities, and what followed. If, on the one hand, I perceived the sentence said by the participant in the context of that meeting as discordant, on the other hand also the quote I had chosen was "discordant and distant from the woman's experience.

The choice to read that quote was based on a tautological premise of mine. A tautology, for Bateson (1979) consists of a body of propositions strung together in such a way that the links between the propositions are necessarily valid. In social educational work the presence of a significant tautological component is a real risk. The categorisation

of social needs and people creates a chain of logical prepositions that often end up as taken for granted ‘perspectives of meaning’ (Mezirow, 1991). In the specifics of this story, the choice to read that quote was based on the assumption that considering disability as a common good would make everyone feel more united. However, the participant's reaction immediately took me outside the framework of my assumptions, leaving me 'speechless'.

Here is a second example, taken from a research-training course aimed at volunteers of associations offering sports and leisure activities to people with intellectual disabilities:

> Three days ago I held a research-training meeting with volunteers from disability associations in my area. I had planned it carefully and was interested in hearing their views on the year of crisis that had just passed. I am a little ashamed to say it now, but I was surprised when I "discovered" that among the thirty-three volunteers present were several family members of people with disabilities. (...) I was taken aback because in my mind the volunteer and the family member were two different things.

In this case I report a feeling of displacement that made me feel 'out of place'. However, displacement can open up new possible worlds. How can my way of being in the relationship change when I become aware of the limits that I use to frame the world? How can my relationship with that volunteer change now that I know he/she is also a parent of a person with disabilities? Dislocations and dissonance can be seen as movements of discomfort that force one out of one's "comfort zone" and can be ways of decentralisation and imbalance.

Disequilibrating power relations is also a goal underlying a problematising and dialogic education (Freire, 1972). This implies abandoning the limiting view provided by social categorisations to recognise the intersectionality aspects that make up people's multiple identities (Davis, 2008). Bateson (1972) speaks of ‘bisociation’ to refer to that conversation between two incompatible habitual patterns of action that make up a meaningful unit. Bateson (1979) writes:

> We commonly speak as though a single ‘thing’ could ‘have’ some characteristic. A stone, we say, is ‘hard’, ‘small’, ‘heavy’, ‘yellow’, ‘dense’, ‘fragile’, ‘hot’, ‘moving’, ‘stationary’, ‘visible’, ‘edible’, ‘inedible’, and so on. That is how our language is made: ‘The stone is hard.’ and so on. And that way of talking is good enough for the marketplace (…). But this way of talking is not good enough in science or epistemology. To think straight, it is advisable to expect all qualities and attributes, adjectives, and so on to refer to at least two sets of interactions in time (ibid., pp. 60-61)

Social categories are stable forms of knowledge which, however, can lead to social mechanisms of exclusion. Moreover, they tighten relations between people and their social roles. On the contrary, the decentering caused by a displacement or a dissonance induces one to be lightly flexible and open to the exploration of new meanings.

In contemporary dance, disequilibrium is not only a way of falling but also an exercise in dynamic, ecological, relational balance. There are partnering exercises in which the couple of dancers look for a way out of their own body axis in order to find a dynamic balance: a third axis of balance given, precisely, by the relationship. This requires continuous reciprocal listening and the ability to know how to constantly dose one's own thrust and strength.

In the social educational work, together with the awareness of one's own constitutive, cognitive and operative vulnerability, disorientations and off-key notes can become useful ways to search for forms of dynamic equilibrium in which the power to build theories and actions around social problems is shared.

Macro level: composition process as a method of social educational design

> It is as if the pandemic has given a boost to the process of de-institutionalisation from the service which we have been working on for some time. Our centre functioned as a centripetal force, as if it had to be the container for everything. Now the service as a physical structure is closed. And so everything is starting again from the beginning, from the home and the family. What I am experiencing with operators, users and families is a return to observing what can be known, discovered and re-evaluated about the person with disabilities in their own home.

Through these words, a coordinator reflects on how the constraints created by the crisis encouraged an agency (Bandura, 1997) that could produce unprecedented realities. Faced with the impasse of a solution that could not be found, what was possible was action. 'Try to act so as to increase the number of choices.' is the ethical imperative of Von Foester (2003, p. 295).

In contemporary dance, choreography is the result of an overlapping of different phases that follow each other in a way that is not necessarily linear: improvisation, repetition, composition. In the improvisation phase, the constraints established at the beginning of the practice are important because they delimit the field of action of the dancers. They can be themes or limits in the possible movements. These constraints are functional to open possibilities of movement, to introduce creative novelties in the patterns of action and to open the doors to the imagination of the dancer and choreographer. This allows the emergence of sequences of actions interesting for the choreographic work: pertinent differences (Bateson, 1979) in the undifferentiated magma of improvisational research that are then selected and repeated. This work of repetition serves, in the slang of the contemporary dancer, to "clean" the sequence, to eliminate what is not needed and to add what is missing to make the sequence clear and comprehensible.

When the material collected is sufficient, we move on to the composition phase. Composition encompasses both process and creation (Formenti, 2017). In it, the individual level (the individual dance), the relational level (the collective dance), the conceptual level (the meaning of the whole composition) interconnect and coexist in patterns that connect.

Looking at the research-training paths that have progressively composed my research design, I recognise a process that has had a compositional and linear quality at the same time. The crisis situation gave rise to new educational and social practices in the services examined by my research. The repetition and sharing of these practices within the research-training paths allowed them to be repeated in different contexts. This produced further variations and differences which were then subject to critical and systemic reflection. In the same way, in the research-training oriented to the co-construction of housing autonomy projects, the opening of the process to volunteers and family members allowed deliberate actions to emerge as the result of a dialogue between different perspectives.

I do not therefore intend to propose here a planning method that is antagonistic to the linear one. Rather, I would like to present a new possibility offered by the crisis that allows different ways of planning to coexist in uncertainty. In contemporary dance, these two methods naturally participate in the composition of a choreography, as is clearly shown by the words of Giorgio Rossi (2021), contemporary choreographer of Sosta Palmizi, one of the most recognised contemporary dance companies in Italy:

> When I propose work on the poetic art of movement, I believe in the relationship with one's own sensual and consenting dancing body (always attentive to the senses, to one's own simple falling to the ground, where every movement is based). I feel close to the gardener, who brings an instinctive wisdom and in direct contact with nature, but I do not forget the watchmaker for his rationality and planning. At the end of the day, it is a question of tendencies and not absolutes. The dancer, like the musician, must unite the imaginative side with the mathematical and architectural side in space and time.

The reflections and proposals of the research participants in the research-training courses carried out during the crisis were also collected in a document that became the object of discussions with local public authorities and the Lombardy Region. This contributed to the issuing of a regional law (Regione Lombardia, D.G.R. 5320/2021) which recognises and supports the transformation taking place in the services. It states:

> Since February 2020, the services (...) have been organised and coordinated in order to deal with the health emergency in progress, in an attempt to protect service users and guarantee, at the same time, family support interventions. (...) There was a new and unusual way of being close to families and disabled people (...). These methods have enabled the operators to see skills and resources in the families and in the people which were not perceptible in everyday life before the lock-down and to personalise the choice of tools, times and contents. (...) Today, more than ever before, there is an important opportunity to experiment with a new reorganisation of the services on offer, through the creation of pathways and individual projects in response to the diversification of the needs of people with disabilities (...). (ibid., pp. 1-2, my translation)

Conclusion

Foucault (1975) states that the supposed objectivity and neutrality of the human sciences is heavily subordinated to their being techniques of normalisation and control. The pervasiveness of technology in the social and educational professions only increases the gap between professionals and users, reducing and stiffening relational choreographies. Within this scenario it becomes difficult to conceive spaces for transformative social action.

The crisis understood as a potentially evolutionary process (Morin, 2016; Alhadeff-Jones, 2021) and the possibility of setting up spaces of thinkability in uncertainty have put in the field investigated a process of systemic reflexivity (Jude, 2018; Formenti & Rigamonti, 2020) that involved the micro level (the individual participants involved in the research-training paths), the meso level (the relationships between the participants) and the macro level (the laws).

Re-reading the research material a few months after the end of the fieldwork, being questioned and moved by it again, allowed me to connect with the data in a more sensitive way. I recognise how my identity, life, beliefs, feelings and relationships have influenced my approach to the research and the conclusions I have reached (Adams et al., 2015).

However, I believe that the recovery of an embodied and sensitive dimension of social educational work can be a powerful antidote against the colonisation of the imaginary (Latouche, 2003) and the excessive technicalisation and bureaucratisation of practices. The acceptance and exercise of one's own transience, the awareness of one's own weight in the relationship, the search for dynamic balances that are continually negotiated with the context, and the exploration of design methods that flank linearity with compositional design paths, can constitute paths capable of moving social educational action towards transformative horizons, on a micro, meso and macro level.

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Aims & Scope

The European Journal for Research on the Education and Learning of Adults (RELA) is a refereed academic journal creating a forum for the publication of critical research on adult education and learning. It has a particular focus on issues at stake for adult education and learning in Europe, as these emerge in connection with wider international and transnational dynamics and trends. Such a forum is important at a time when local and regional explorations of issues are often difficult to foreground across language barriers. As academic and policy debate is increasingly carried out in the English language, this masks the richness of research knowledge, responses and trends from diverse traditions and foci. The journal thus attempts to be linguistically 'open access'. Whilst creating a forum for international and transnational debate, contributions are particularly welcome from authors in Europe and other locations where English is not the first language.

RELA invites original, scholarly articles that discuss the education and learning of adults from different academic disciplines, perspectives and traditions. It encourages diversity in theoretical and methodological approach and submissions from non-English speakers. All published contributions in RELA are subjected to a rigorous peer review process based on two moments of selection: an initial editorial screening and a double-blind review by at least two anonymous referees. Clarity and conciseness of thought are crucial requirements for publication.

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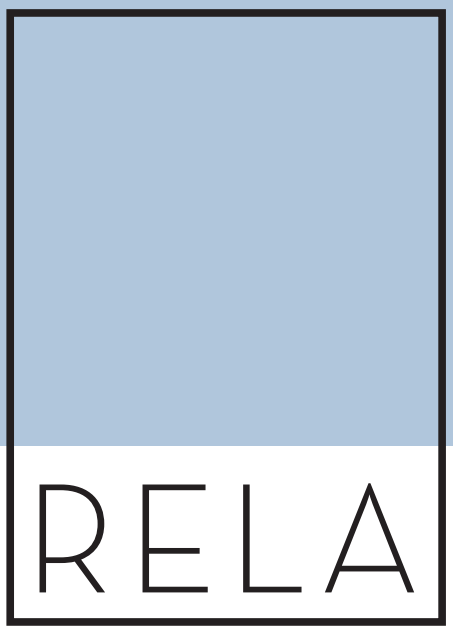

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