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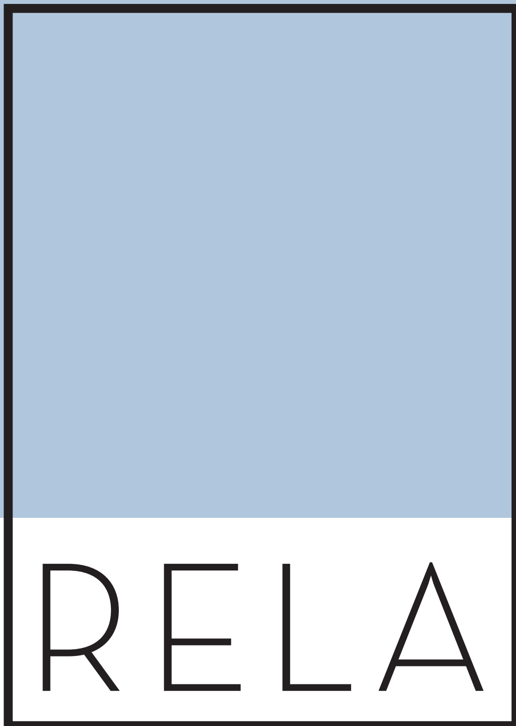

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Dropout in adult education as a phenomenon of fit – an integrative model proposal for the genesis of dropout in adult education based on dropout experiences

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Abstract

In adult training practice, dropout marks the transition from participation to non-participation. There are only a few theoretical models, especially from the second half of the 20th century, that address this phenomenon. With special consideration to the congruence model of Boshier (1973) and the integration model of Tinto (1975, 1993) the study focuses first on the theoretical discussion of empirically grounded models for the explanation of dropout in the field of adult education. Against the background of analyses of 40 problem-centered interviews with dropouts from adult education, the two models are examined as to their explanatory contributions. Based on these empirical and theoretical explorations, a newly developed typology of as well as a model for dropout are proposed which topicalize dropout in adult education as a phenomenon of fit.

Keywords: adult education, adult education decisions, dropout, dropout model, fit

Introduction

The phenomenon of premature termination of participation in adult education [1], also known as dropout, is well-known in adult education practice. In this phenomenon, individuals discontinue

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their participation in continuing education before the regular end of the education program, even if they were registered for the education program and participated in it up to a certain point. This phenomenon is known from all areas of training and occurs regardless of the length of the training (Hoffmann, Thalhammer, von Hippel & Schmidt-Hertha, 2020, 2021).

Today the field of international research on dropout is characterized by a broad scope of analytical perspectives which include diverse groups of participants or research settings as well as special course formats (e.g. Bariso, 2008; Park & Choi, 2009). A lot of research has been done on higher education dropouts, including some work on the retention of 'older' students (usually defined as older than 25), as is shown by the summary given by McGivney (2004). The qualitative study by Jacot, Frenay and Cazan (2010) points to the relevance of competing areas of life, in particular work or family commitments, which may be responsible for dropout. The study emphasizes the importance of acknowledging the relevance of what is being learned for mature students. An earlier quantitative survey by Shank and McCracken (1993) on dropouts in adult vocational training additionally underlines issues of financial support as well as social and academic integration while participating in training. Furthermore, processes in learning events are being investigated, e.g., by Ten Dam (1995), who relates the participants' individual self-perception to the respective external ascriptions by the teacher. A bundle of studies can also be found on attrition in adult literacy programs or adult basic education (e.g., Kambouri & Francis, 1994; Perin & Greenberg, 1994; Ziegler, Bain, Bell, McCallum & Brian, 2006). In this area of education, dropping out can mean quite different things for different learners. As many programs last longer than a year, the likelihood of significant changes occurring in other areas of life during that time span is rather high and personal learning goals may have been reached long before a course ends (Pickard, 2013). Similarly, research has been carried out in the field of adult language learning with regard to attrition and to the retention of participants (e.g., Evans & Tragant, 2020). A challenge for future research is to look not only at highly intensive educational programs lasting several years, but to also take into consideration that the majority of adult education programs is not that long-termed and is not necessarily of the same biographical relevance as a university study program. What is therefore also needed is an integrative theoretical model for analyzing drop-out in different adult education contexts.

Evans and Tragant (2020) suggest looking not only at motivation as a positive factor allowing to keep learners on track, but also at demotivation as the negative counterpart. Garrison (1988) identifies five variables (intrinsic and extrinsic motivation, intrinsic and extrinsic constraints, skills) as determining factors for either change or stability in the behavior of adult learners. This approach can be linked to the differentiation made by Darkenwald and Gavin (1987), who consider a discrepancy between expectations and experiences to be decisive for dropout. In this, motives for participation or orientations in participation are not only multiple, but also mostly neither conscious, nor rational. This also complicates the empirical research into educational dropouts regarding the recording of dropout reasons.

In addition, research trends can be identified with regard to participation in adult education: characteristics of educational participants are investigated quantitatively, through quantitative surveys on sociological characteristics, or qualitatively, by accessing educational biographies. Against this background Jacot et al. (2010) point out that dropout research and theory building should take greater account to the linking of the individual with the institution (Jacot et al., 2010).

First of all, it becomes clear that there is a multitude of findings that need to be considered in theoretical models for dropout. In this article the guiding question is '*which theoretical models are currently available in dropout research in adult education*': First, it will be shown that there currently seem to be only two theoretical models that appear to be relevant to adult education research: This is (1) the integration model by Tinto (1975, 1993) and (2) the congruence model by Boshier (1973). Both models will be presented and their significance for research on dropout will be outlined (chapter 2). Subsequently a current empirical study, based on 40 problem-centered interviews with dropouts from adult education in Germany will then be presented (chapter 3). The explanatory value of the two models for the discourse on adult education will be discussed on the basis of current empirical findings from the study to be presented (chapters 4.1 and 4.2). In an extended continuation an empirical based dropout typology of non-fit will be presented (chapter 4.3) and, based on this typology, an integrative model for the genesis of

dropout in adult education will be proposed (chapter 5). Both empirically developed theoretical proposals were generated using the grounded theory methodology (Strauss & Corbin, 1998) and address dropout experiences of adult education as a phenomenon of fit.

Theoretical background and state of research

Garrison stated as early as 1987 that a theoretical research framework was required for the field of adult education in order to be able to understand the dropout phenomenon. He argued that there were too few attempts to develop a systematic strategy and too many comparative studies that did not take into consideration theory building (Garrison, 1987). To this day, that doesn't seem to have changed. Both then and now in adult education research, only one model is known to have been explicitly developed to explain dropout specifically in the field of adult education: This is the congruence model of Boshier (1973), which emerged about 50 years ago. However, this model has hardly been used since then, critical reflection on the circumstance is lacking, and alternative or complementary explanatory models for the dropout phenomenon has not been developed in adult education research. Against this background, Boshier´s model is first presented in more detail (chapter 2.1).

From today´s perspective, however, empirical and theoretical debates that explicitly deal with the phenomenon of dropout in adult education seem to have become a rarity in adult education research (Hoffmann et al, 2020, 2021). This is particularly striking when comparing dropout research in adult education with other areas of educational research. For example, in the field of university research [2], there is at present an increase in scientific analyses of dropout (among others in Germany), as is also revealed by diverse recent government research funding. Of principal interest are questions as to the causes, the extent, and the consequences of dropout in higher education as well as questions as to the effectiveness of existing approaches to and methods of securing academic success. In this specific pedagogical context, the integration model developed by Tinto (1975, 1993) has proven helpful in explaining dropout and has become established. Even if higher education is comparatively close to adult education due to the target group, the question arises whether the gained insights can be transferred to the field of adult education. After introducing the Tinto model (chapter 2.2), this will be examined in more detail in chapter 4, based on actual data analysis.

But first of all, the congruence model by Boshier (1973) and the integration model by Tinto (1975, 1993) will be presented and their significance for research on dropout will be outlined (chapter 2.3).

The congruence model by Boshier

The theoretical model developed by Boshier (1971a; 1972b) to explain participation and drop-out in adult education is based on the fundamental assumption that participation in further education is dependent on the interaction and fit between psychological factors (learner) and external factors perceived by the subject (learning environment). Building on his former work on theories of motivational psychology and on models from personality psychology from the 1950s and 1960s (Boshier, 1971b), on the one hand, and on his empirical work on dropouts from New Zealand adult education programs (Boshier, 1971a; 1973), on the other, he started developing a theoretical model for dropout among adult learners. Boshier`s congruence model is inspired by the work of Houle (1961), Maslow (1967), and Rogers (1963). His main differentiation is between deficiency-oriented and growth-oriented learners. ‘The growth-motivated person is inner-directed, autonomous, open to new experience, willing to be spontaneous, creative, and free from deterministic attitudes’ (Boshier, 1973, p. 256), and has satisfied their basic needs in the sense of Maslow’s (1967) hierarchical model of needs. Deficiency-oriented people, worry about disappointments, ‘are afraid of the environment’ (Boshier, 1973, p. 256), and feel driven by outer circumstances. This is what Boshier also calls intra-self incongruence with reference to Rogers’

(1963) terminology. He presupposes 'self/institution incongruence' as a consequence of intra-self incongruence for participation, whereas dropout evolves from 'intra-self and self/other incongruence' (Boshier, 1973, p. 257). If there is no congruence between individual needs, expectations, or values and the institutional arrangements in the form of the perceived attitudes, values, or convictions of the persons linked to the institution, then this results in dropout. However, his model should not be understood as deterministic or dichotomous. Just like growth motivation/intra-self congruence does not exclude the possibility of dropping out, deficiency motivation/intra-self incongruence does not automatically lead to dropout. Rather, both motivational points of origin have to be seen as extreme ends of a continuous unilinear scale, with individuals usually showing a mix of deficiency and growth motivation (Boshier, 1977). Finally, Boshier, in an experimental study (1972a), tried to show that growth or deficiency motivation can be influenced by the learning environment; in this, however, he was not entirely successful.

The integration model by Tinto

During the 1970s, the US-American sociologist and education theorist Vincent Tinto addressed the phenomenon of dropout. In his theoretical writings "Dropout from Higher Education" (1975) and "Leaving College" (1993) he aims at explaining the processual nature of dropout cases, not a description of dropout. These works build on the initial study by Tinto and Cullen (1973) as well as on the study by Spady (1970, 1971).

In order to adequately grasp the issue of dropout, Tinto creates a synthesis of the research on dropout in the field of higher education (Tinto & Cullen, 1973; Tinto 1975, 1993). On this basis, he develops a longitudinal and interactional model for dropout (1975, p. 95; 1993, p. 113), which, from an institution-oriented perspective, focuses on the development of dropout and on influencing factors specific to different phases of this process. His theoretical model 'can be viewed as a longitudinal process of interactions between the individual and the academic and social systems of the college during which a person's experiences in those systems […] continually modify his goal and institutional commitments in ways which lead to persistence and/or to varying forms of dropout' (Tinto, 1975, p. 94).

Tinto (1975) assumes that students enter the institution with their very own family backgrounds (e.g., social status attributes), individual attributes (e.g., sex or race) and pre-college experiences (e.g., academic and social attainments) and that these, in turn, influence their goal and institutional commitments. With regard to the question of either graduating or dropping out, the highest prominence is given to academic and social integration, which Tinto theoretically grounds on Durkheim's suicide theory (1951) and on his emphasis on the relevance of social and intellectual integration with regard to one's social life and society: the higher the degree of integration in the academic system (expressed, e.g., in academic achievements, grades, intellectual developed, or the individual identification with norms and values of the academic system) or in the social system (expressed, e.g., in relations and interactions with fellow students and faculty members such as lecturers, professors, or university staff), the stronger the commitment to the institution and to the goal of achieving graduation. Ultimately, this commitment will decide whether a student will dropout or finish their course of studies as scheduled. This institutionally-centered perspective is broadened about 20 years later, when Tinto (1993), in his model, gives greater prominence to 'external communities with their own set of values and behavioral requirements' (Tinto, 1993, p. 115), so that college becomes but one of several commitments which have to be balanced. Accordingly, these extra-institutional commitments, too, determine departure decisions.

Interim conclusion and deduction of the study's guiding question

Looking at these two models it can be shown that adult education research does not have an integrative theoretical model for analyzing drop-out in different contexts of adult education. Both dropout models presented above focus differently on the interaction of individuals and institutions. Tinto's model emphasizes the processual nature of dropout and the special

significance of academic and social integration of learners for the context of higher education. Boshier's model puts greater emphasis on the significance of additional factors which, independent of the individual, influence a learner's motivation for participation or their decision to either stay on or drop out.

The only existing theoretical dropout model emerging from and pertaining to the field of adult education is rarely taken up. Since Boshier's model seems to be the only one that directly addresses dropout in adult education, it is somewhat surprising that, so far, it has hardly been referred to in relevant studies. One reason for this lack of attention might be a certain inconsistency in Boshier's psychological point of origin, in that he refers to a two-fold model of personality, referring to Maslow and Rogers on the one hand, and, on the other, he advocates taking into account the interaction of individual dispositions and environment. It remains unclear, to what extend the environment really can influence idiosyncratic drop-out tendencies and how far drop-out can be clearly predicted by individuals' relation to the learning contents. Thus, the question remains to what extent dropout can be predicted by personality (deficiency motivation) and in how far the environment is of relevance to the further course of attendance. To get one step ahead with that question, a more open and explorative research design is needed that also enables a further development of theoretical concepts. The question arises to what extent the model of Boshier should be taken up again more strongly in dropout research and what weakness and strength it has (chapter 4.1).

In contrast, the model of Tinto is paid much more attention. Since this model has been developed, numerous studies have built on it and have continued to advance it, partly with regard to specific contexts (most recently Kerby, 2015; Chrysikos, Ahmed & Ward, 2017; Li, 2017; Klein, 2019; Neugebauer, Heublein & Daniel, 2019), and finally, 'such model has been cited in a considerable number of research works […] and has contributed to the proposal of hybrid models that share its goal' (Carmo Nicoletty, 2019, p. 61). Limitations can be seen in 'that the process [of modelling the dropout process] itself is highly dependent of several intertwined factors, such as geographic […], social […], cultural […], temporal and economical […], besides those related with the course […] and with the institution; as a consequence, it is a process hardly prone to generalization' (Carmo Nicoletty, 2019, pp. 62f). The field of higher education is comparatively close to adult education due to the target group. Nevertheless, the question arises whether the gained insights can be transferred to the field of adult education (e.g. with regard to the different framework conditions and the relevance of exams and qualifications).

Against this background and with reference to the results from a recent study on dropout in the field of German adult education, it will, in the following, be examined 'whether and to what extent the models by Tinto and by Boshier contribute to the explanation of dropout from adult education' (chapter 4). The desiderata shown are taken into account in development of a new, empirically founded theoretical typology of non-fit (chapter 4.3) and a integrative model for the genesis of dropout in the field of adult education (chapter 4.4).

Methodology and data analyses

To answer the question 'whether and to what extent the models by Tinto and by Boshier contribute to the explanation of dropout from adult education' (chapter 4.1 and 4.2) empirical data from a current study carried out in Germany are used. The presented study is a qualitative analysis of empirical data to the dropout phenomenon in adult education [3]. The aim of the study is to explore processes of dropout in the field of adult education as a first step that should contribute to refine existing theoretical models or provide impulses for new theoretical concepts. Therefore, we follow the Grounded Theory Approach (Strauss & Corbin, 1998) to generate new insights into the genesis of dropout in the adult education sector and to contribute to a deeper understanding of individual dropout decisions. As a main database for this approach we collected interviews and analyzed this data following the concepts of Strauss and Corbin (1998).

Data collection

The study is based on 40 qualitative problem-centered interviews (Witzel, 2000) with individuals who have dropped out of adult education courses in Germany. In various adult education institutions and open public places (e.g. libraries, supermarkets, hair salon, advisory services) information was posted about the study and people with dropout experiences were searched for voluntary interview participation. Selection of the interview partners was partially carried out according to the theoretical sampling (Strauss & Corbin, 1998), but also – and in deviation from the strict interpretation of theoretical sampling – on the basis of plausible presuppositions (e.g. age, gender, the type of adult education, duration and funding of training) (e.g. Reich-Claassen, 2010; Schmidt, 2011). In this way, a sample that was as rich in contrast as possible was generated: The age of the participants varied between 24 and 68 years. A total of 29 were female and 11 male. Using the highest school-leaving qualifications, care was taken to ensure that the sample does not only include people with a high level of education: 35 people have an advanced school leaving certificate, three have a secondary school certificate, one person has a lower secondary school certificate and one dropped out of school. The interview participants have experience of dropping out of adult education in very different training courses: There are distinct variances in the duration (between two weeks and several years), but also with regard to the content-related topics, the group sizes and the funding of the training. Despite the great variance, all interview participants have one thing in common: they have had at least one or more significant dropout experience in adult education. In this way, a total of 48 individual dropout experiences could be reconstructed by analyzing this data corpus. The analyses only include dropout experiences (the termination of participation before to the regular end of a course) from adult education programs which suffice the criteria of the definition of continuing education formulated by the German Education Council (1970). The spectrum of adult education comprises vocational and general continuing education programs, the expansion of basic education, as well as political adult education measures.

Data analysis

In analyzing the interviews as individual cases, methodical techniques based on the premises of Grounded Theory (cf. Strauss and Corbin, 1998) were used. For example, each empirically determined abortion experience was systematized and visualized in its own complexity. In this way, among other things, more in-depth approaches to the respondents' motives for action and interpretation schemes were explored, which go well beyond the explicitly stated reasons for dropout.

In addition to the analysis of individual cases cross-case comparative analyses (Miles & Huberman, 1994) were carried out to develop types on the basis of deductively and inductively gained categories. The objectives of our typology are both descriptive-structuring and theoretical-heuristic; the aim is to reveal content-related semantic connections (Kluge, 2000). Empirically grounded typologies are situated between empiricism and theory and are thus an ‘intermediate step in theory building’ (Kluge, 2000, p. 51). The construction of types has the potential to serve as a basis for the deduction of action-relevant knowledge to be applied in practice (Schmidt-Hertha & Tippelt, 2011, p. 23). Our typology represents an interim step on the way to generalizable statements, e.g., with regard to the development of a model (cf. chapters 4 and 5).

Having developed other concepts of empirically grounded categorizations of ideal types, Kluge (2000) advances a systematic and intersubjectively traceable stage model. Our empirically grounded typology is a multi-dimensional typology, based on combinations of features (Kluge, 2000). It is not a typology of persons but a typology of non-fit among dropouts from adult education. This entails that a person with diverse dropout experiences can be assigned to various types (see also Kluge, 2000).

The development of such typologies requires comparative dimensions which allow for a positioning of the empirical cases. These comparative dimensions were at first inductively elaborated and then through a supplementary deductive procedure related to theoretical models

and further differentiated. Thus, for instance, the integration model by Tinto was used because it is considered a validated model with regard to the explanation of dropout from study courses in the context of higher education. Likewise, social and academic integration (according to Tinto, but adapted to adult education programs) were explored as comparative dimensions (among many others). In the course of the case analyses and case comparisons, however, the situational fit/non-fit crystallized as the core category [4]. Our two central comparative categories for the actors and contexts involved in dropout are both empirically significant and theoretically compatible; in their combination, they describe different kinds of non-fit. In a multiple field table (see figure 1 and chapter 4) we have depicted all theoretically possible combinations of characteristic values, which we have then transferred into a proposition of a model for the genesis of dropout in adult education (see figure 2 and chapter 4).

Results

The different models by Tinto and Boshier presented above each focus on the dropout phenomenon, but still, in each case a different perspective is assumed and different facets of dropout are focused upon. Therefore, we will explore which empirical phenomena can be explained either well, less satisfactorily or not at all with the respective model. This allows us to show that the individual models contribute in different ways to the explanation of dropout and to reveal their limits.

The explanatory contribution of Boshier's congruence model

In the strongly psychologically grounded approach Boshier centers on the social relations. The focal point of his observations is thus the maintaining of inner harmony both with oneself and with the environment. With regard to the environment, the institutionally framed relations between learners and teachers (e.g. lecturers or trainers) and between learners and other students (Boshier, 1973, p. 259) are above all taken into consideration.

Ideally, the learner's experience of self matches up with the ideal self-concept (congruence). The degree of 'congruence' or balance between the students' concepts of self and the two most important aspects of the adult education environment (the other students and the lecturer) are associated with dropout behavior (1972b, p. 88). If the equilibrium in the adult education situation becomes unbalanced, the participant will feel 'uncomfortable in a group', 'bored', or 'generally at loggerheads with the situation he found himself in' (Boshier, 1972b, p. 260). It is assumed 'that so-called ‚non-course-related' reasons for drop-out are often used as a rationalization for dropping-out for 'course-related' reasons' (Boshier, 1972b, p. 97). Boshier 'suggested that dropout, particularly occurring for course-related reasons, can be understood as a function of the cumulative effects of self/other incongruence developing in the adult education situation, but which initially stems from 'deficiency' motivation, an intra-self (self-ideal) incongruence' (Boshier, 1973, p. 167f). In pointing to the causes for the motivations for dropping out, Boshier refers to the psychological basic model, thus linking the reasons for dropping out solely to the individual dispositions of the learner.

It has to be kept in mind that Boshier's theoretical model is based on empirical data that is related exclusively to non-credit liberal adult education, a sector which is open to each and every one who wishes to study. Since we applied a broader concept of adult education in our study, we also considered cases of dropout beyond this limited framework of adult education programs (e.g. obligatory participation in further training).

When referring to examples of adult education which are roughly similar to those examined by Boshier, then the congruence model is useful for explaining cases of dropout. The limitations of Boshier's congruence model with regard to the explanation of dropout become evident once we look at adult education programs featuring final exams. Due to the different requirements and framework conditions, such offers of adult education are only comparable to a limited extent to

the programs investigated by Boshier. Even if the participants show pronounced 'growth motivation', the influence of third bodies on the dropout behavior is not to be underestimated. Thus, the analyses of empirical data carried out in our study reveal the decision-making power of the employer or the supervisor in cases of participation in vocational further education programs, in particular. This can above all be observed when participation in the training course is financed not by the participant themselves and/or when, for example, arrangements have been agreed upon with regard to the possibility to include working hours in the training program. In these cases, the analyses of the interviews show that the congruence model by Boshier is of only limited explanatory value: other persons or third bodies (e.g., employers or the state) which, in addition to the learners, the other participants, and the lecturers, are at least indirectly involved in the process of adult education are not (or hardly) taken into consideration by Boshier.

It can thus be stated that the congruence model by Boshier is of only limited use with regard to the explanation of dropout from adult education if third bodies are involved in the decisions relating to the training and/or if participation is linked to certain obligations (e.g., exams).

The explanatory contribution of Tinto's integration model

In contrast to Boshier, in his approach Tinto tries to describe a social phenomenon as being (multi-)causally determined, contextually embedded, and as processual in nature. Therefore, he focuses mainly on categories of social and academic integration. He presupposes a network of meaning with regard to the relations of the actors found in the academic field, and he adopts a mainly institutional perspective: the individual's behavior is seemingly of interest mainly in relation to the institution 'college' and only within the lifeworld context of the individuals.

In the course of the project, the dimensions of social and academic integration repeatedly served as heuristics for empirical observations. The great importance given to social relations pertaining to the dimension of social integration is also reflected in our material. These relations do not refer only to the limited group of persons linked to the institution (such as counselors, lecturers, other learners), but also to the private and professional environment of the participants, sometimes even to persons who decide on a premature termination without involving the person participating in a program (e.g., employers or an agency). The dimension of academic integration, too, can be found in our material because instances of content-related overload/underload are also an issue in adult education programs. Usually, however, performance expectations on the part of the institution are less important in adult education; often there are no process-accompanying tests or certification-related exams. In those cases, however, in which examination formats are integrated, these may well be a reason for dropping out.

In relation to the context of adult education, however, Tinto's model is of greater informative value with regard to dropout from the university as an institution of the tertiary sector. His claims have to be considered contextual in two ways: (1) They can be regarded as primarily institution-related because he specifically focuses the college context with all its framings, conditions, and dynamics. (2) They can be considered linked to the tertiary educational sector because individuals spend most of their time during training periods (both while teaching and while studying) in these institutions and even outside of these timeframes they are dealing with the related contents. During that time, the foundation is laid for the subsequent professional phase.

On both points, differences can be identified in institutions of adult education compared with school education and initial vocational training institutions: places of adult education are subject to different dynamics, are differently equipped, have different systems of application, enrollment or mentoring, conclude with (or without) diverse certificates, etc. Institutions of adult education differ in many ways from the constitution and the rules of the institution 'college'. Differences cannot only be identified as to the constitution of an institution, but also in the question of how these institutions and the educational offers they create are linked to the lifeworld of the individuals. In this context, comparisons show that participants do not usually attend adult education programs fulltime for a timespan of several years (unless, e.g., they are enrolled in a full-time retraining), which is generally the case with regard to enrollment at a college. Therefore, the factors of social and academic integration in Tinto's model decrease with regard to the field

of adult education, because a large part of adult education measures requires participants to spend but a few hours per month in the institution, and other factors outside the institution of adult education gain in importance. Compared to college students, participants in adult education are in a different phase of life; they often have a time-consuming job, are in the family-phase of life and sometimes in a phase of caring for relatives. They find themselves perhaps in the rush hour of life or in their final years of professional activity and thus move in different contexts, of which adult education is but one. Models explaining dropout from adult education thus need to include extra-institutional contexts. Tinto himself came to that conclusion when further developing his model for the college sector and therefore added to his model of 1993 the category 'external environment' with its values and attitudinal conditions. Although external environment is not considered a dominant explanatory force in Tinto's model, it at least considers that students have a life outside of college, despite the fact that they spend most of their time in college. This category – included, but still ranked secondary – proves to be a crucial category for the explanation of dropout from adult education in our research in the context of adult education. It allows to grasp reasons for dropping out that lie outside of the relation between individual and institution – and which may perhaps be located in the individual and their changing lifeworld or which may be triggered entirely by external bodies. This is substantiated repeatedly by our empirical material.

The model thus offers some potential for the transferability of its explanatory force from the college sector to that of adult education, but it is not in all respects suited for explaining dropout in the field of adult education. While Tinto proposes a causal-analytical model for the university sector which fans out commitments relevant to college students' decisions to either drop out of or remain on a course, our typology of fit (see below) offers a hermeneutic-understanding approach to reasons for dropping out from adult education programs, made possible by the interviews and the reconstructions of reasons for dropping out from subjective accounts of experiences.

Empirically grounded expansion proposals: a typology of non-fit

In reference to Tietgens (1992), dropout is regarded as a possible result of search movements: while teachers in adult education, in their planning processes, try to anticipate the needs and expectations of the target groups and to identify as well as arouse interest, the addressees, for their part, search for appropriate programs. Both sides (supply and demand) are thus 'searching' and adult education only happens if there is a concordance of expectations (Tietgens, 1992, p. 67; see also Hippel & Tippelt, 2010). The concept 'fit' used in this context implies the tensions between the individual and the (surrounding) field (such as the field of adult education or, more specifically, an institution of adult education), in which the individual moves temporarily (see next chapter for further elaboration). A dropout thus represents one possible reaction to these tensions.

Against this background and based on the reconstructions of the reasons for dropping out given by the dropouts interviewed for this study, a typology of non-fit has been developed to explain dropout (sc. Figure 1). Altogether seven different types could be worked out in the analysis of the empirical material:

1. The type *intra-individual non-fit* points to a non-fit within a subject with regard to lasting or temporary/situational forms of dealing with the world and themselves. In those cases, dropout ensues when lasting features, such as, e.g., structure aversion in several sectors of life or constant subordination across the lifespan, also arise in the adult education situation and ultimately make it impossible to continue to attend the training. These stable patterns in dealing with oneself and the world thus conflict with a successful participation and a dropout accordingly provides an opportunity to resolve the non-fit and to temporarily (re-)create a fit within the subject; finally, these (intra-individually dealt with) situations of conflict are resolved.
2. The type *life context-related non-fit* refers to changed living conditions, such as, e.g., changing career aspirations, which cause an education course to become irrelevant.

3. While these two types still focus exclusively on the individual and their private and professional lifeworld, the type *inter-personal non-fit* now specifically looks at the adult education sector. In an adult education situation at least two systems of persons encounter one another within a context of adult education as well as other contexts, which, due, e.g., to different expectations, may result in inter-personal non-fit which may manifest itself in heated (open) but also cold (covert) conflicts. This does, in this case, not include conflicts with institutionally affiliated persons such as lecturers, but rather conflicts between, e.g., the individual and other participants or between the individual and their partner.
4. The type *individual-institutional non-fit* refers to a discrepancy between individuals and institutions, such as the institution of adult education in itself or other institutions such as, e.g., a government body: the individual's expectations, stipulated requirements for the lecturers, institutions, assessments of fit, interests do either not fit from the beginning or cease to fit in the course of the training activity. Dissatisfactions on the part of the individual with the institution are perhaps brought up and discussed, but cannot be resolved, so that a dropout ensues, which is usually initiated by the individual.
5. This discrepancy is also taken up by the type *institutional-individual non-fit*. The dissatisfaction and the dropout originate from the institution, for instance when the funding institution (e.g., the employment agency/job center) or the institution of adult education are dissatisfied with the participants' absenteeism and therefore deny adult participation.
6. In contrast to the types mentioned so far, the final two types of fit lead to a dropout without the individual themselves being directly involved. The type *intra-institutional non-fit* shows that the dropout process takes place on a meso-level and the individual is affected by it on a micro-level, without participating themselves in the process. This type of dropout can occur for instance when an institution registers non-fit within itself, e.g., between the institution and a lecturer tasked with running a course who in the course of the program quits this teaching assignment. In that case, a course can perhaps not be continued which would entail the participants' dropping out.
7. The type *inter-institutional non-fit* shows that non-fit may also occur between institutional bodies, thus, for instance, between an employer funding the training and the institution or between the employment agency as funding agency and the institution of adult education. In those instances, too, a decision leading to a dropout may be taken without involving the individual, but by which he or she is affected. This clearly manifests itself when, e.g., an employer terminates a current contract with the provider without considering the adult education interests of the person participating.

As already indicated in the description of the types, these seven types can be assigned to two different dimensions of comparison. By interlinking these two comparison dimensions in a crosstab, it becomes clear how the seven types of nonfit are related to one another in their systematic reference system (sc. Figure 1).

Figure 1: Typology of non-fit in cases of dropout from adult education

<table>
<tr><td colspan="2" rowspan="3">Typology of non-fit in cases of dropout from further education</td><td colspan="4">Which actors are involved?</td><td rowspan="6">always situationally framed</td></tr>
<tr><td colspan="2">The individual in their lifeworld</td><td colspan="2">Institutions/Bodies</td></tr>
<tr><td>Lasting forms of dealing with the world</td><td>The individual within changing contextual conditions</td><td>Further education institution</td><td>Third bodies</td></tr>
<tr><td rowspan="2">In which contexts is dropout evoked?</td><td>Individual level</td><td>Intra-individual non-fit</td><td>Life context-related non-fit</td><td>Inter-personal non-fit</td><td>Individual-institutional non-fit</td></tr>
<tr><td>Institutional level</td><td colspan="2">Institutional-individual non-fit</td><td>Intra-institutional non-fit</td><td>Inter-institutional non-fit</td></tr>
<tr><td colspan="6">always situationally framed</td></tr>
</table>

On the one hand, the fit-related dropout is evoked on different levels: On the institutional just as on the individual level. This results in the first comparative dimension, which we have recorded in the table (Figure 1) in the row category and provided with the following key question: 'In which contexts is dropout evoked?'.

On the other hand, in these fit-related cases, different actors are involved in the adult education process in different ways, directly or indirectly. We have mapped these in the second comparative dimension. As can be seen in the illustration in the columns, the main question in the second comparative dimension is 'Which actors are involved?'. Here, we differentiate between involved actors who can be allocated to the lifeworld of the individuals and who are not involved in the adult education process and actors who, due to their institutional affiliation, are directly (e.g., as staff members of the institution of adult education) or indirectly (e.g., third bodies, such as employers) involved in the training. With regard to the individual's lifeworld, categorized phenomena of dropout are also differentiated by looking at whether the overall context of the interview allows to conclude that the reasons for dropping out can be traced back to lasting causes (e.g., the individual's ways of dealing with the world, such as subordination or structure aversion) or whether they were caused by an ever-changing context in which the individual find themselves respectively (e.g., through loss of a funding source).

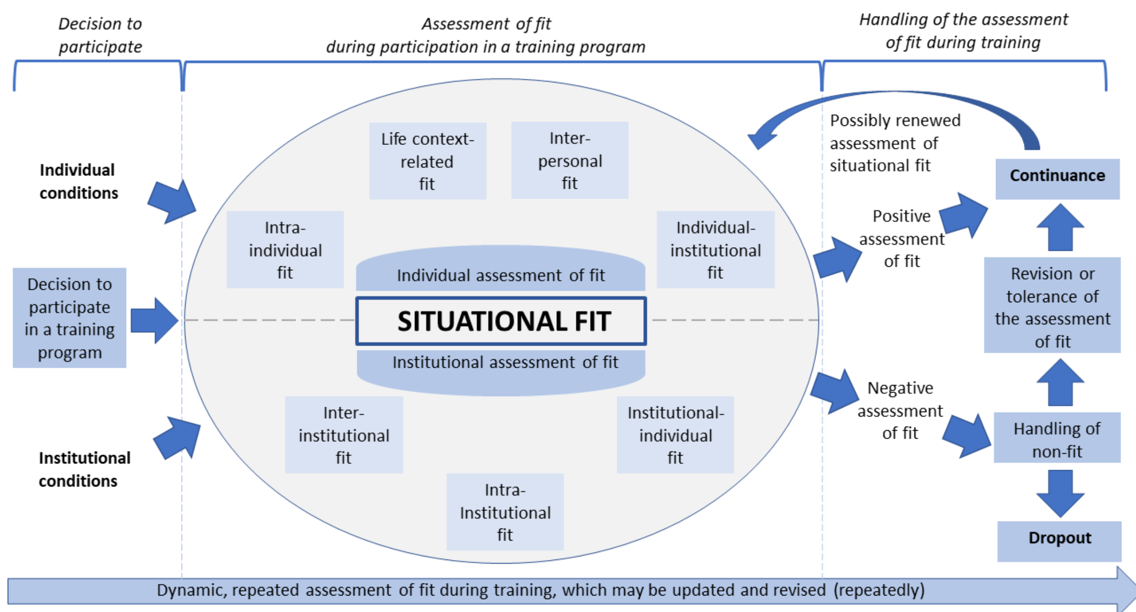
This typology constitutes a useful supplement to the models by Tinto and by Boshier, also because the types *inter-institutional non-fit, intra-institutional non-fit,* and *intra-individual* as well as *life context-related non-fit* cannot be explained by Tinto's model, but are brought to the fore here. The type *inter-institutional non-fit* provides a new perspective with regard to Boshier's model because here it becomes evident that a dropout may occur although there is a pronounced 'growth motivation' among the participants, which does not prevent a dropout grounded on reasons outside of the individual. The typology presented here differs from Boshier's and Tinto's considerations in that it provides a meaningful broadening of the perspective on dropout, especially in the field of adult education.

A proposal for an integrative model for the genesis of dropout in the field of adult education

Instead of the strongly psycho-therapeutically determined concept of congruence, as proposed by Boshier, and instead of Tinto's concept of integration, which emphasizes the assimilation of the individual in an institutional context, we would like to propose the concept of fit. This concept implies a status description which detaches itself from the normative demand for (unilateral) assimilation and which focuses on the processuality of dropout. Furthermore, the concept of fit as a purely descriptive-analytical category is initially free from attributions of responsibility and

open to the dynamics of change inherent in the prerequisites on the part of the learners and their living conditions as well as on the part of the education offers. Fit is not to be understood as congruence, rather, fit may be perceived even under conditions of diversity. We do not assume a phenomenon which can be observed objectively, but rather, we conceive of fit as a relational construct (Emirbayer, 1997) which may be experienced as such subjectively by the individuals or institutions involved. If this fit, which will be further elaborated as a construct in the next sentences based on the empirics of the research project, is deemed insufficient by at least one side (individual or institution) and if it is felt to be impossible to (re-)create a sufficient fit, then it comes to tolerance of this or dropout ensues. Aspects that may not be a fit between these two contexts (individual and institution) and their inherent groups of actors include mutual expectations, motives, desires, needs, contents, interests, requirements and prerequisites for participation and completion of a continuing education program, teaching/learning cultures, imparted contents, and other framework conditions of the offering (such as times, costs, teaching/learning setting, etc.). Based on all these aspects and the evaluation of these by the various groups of actors, fit assessments are ultimately formed on the part of the individuals as well as the institutions. These can have an objective character (e.g. formulated criteria such as access requirements) as well as a subjective character (e.g. non-formulated criteria such as benefit expectations). They are by no means rigid, but are subject to dynamic, situational negotiation processes against the backdrop of the individual's own socialization, prior experiences, evaluation schemes, etc., and are accompanied by cognitive/rational as well as emotional components. Our typology thus also implies an interlacing of perspectives of different actors. The following graphic representation (see Figure 2) illustrates these aspects within a proposed integrative model for the genesis of dropout in the field of adult education.

Figure 2: Integrative model for the genesis of dropout in adult education



The proposed model for the genesis of dropout in adult education (see Figure 2) expands the models by Tinto and Boshier by including other institutions involved directly or indirectly in the training and by also emphasizing the temporal dimension of the dropout case. The complexity of the model thus generated is also due to its development and its empirical grounding in qualitative data. In contrast to Tinto's rather heuristic model, which, although it includes numerous empirically grounded studies, is based on theoretical-systematic considerations, and to Boshier's concept, which is based on psychological theory models and large quantitative surveys, our model builds on these two approaches and expands them by using a number of empirical data. Nonetheless, the data base of this model is subject to limitations. Thus, we lack longitudinal

studies, which would be much better suited to depict the progressions and dynamics of dropout cases. The longitudinal data available, e.g., through the National Educational Panels Study (NEPS) in Germany (Blossfeld, Rossbach & Maurice, 2011), record only a section of the relevant variables and, above all, by no means all cases of dropout from adult education (Hoffmann et al., 2020).

The model presented here allows to map, in the form of a graphic depiction, the different types and their contextual and processual embedding. Causal relations and mechanisms of cause and effect cannot be detected with this model. The proposed typology as well as the accompanying model are located between empiricism and theory; they could represent an intermediate step towards a more elaborate theoretical model. They might stimulate adult empirical studies and, at the same time, they could be of relevance to the practical work of institutions of adult education and of adult education counselling, for the reflection on and both preventive and situational handling of dropout.

Conclusion

The paper was devoted to the question, whether and in how far the models of Tinto und Boshier can be contributed to the explanation of dropout in adult education. In conclusion, the following can be stated: Because Boshier's congruence model is based on empirical data that relate exclusively to liberal adult education without crediting, it cannot be applied to all areas of continuing education. It is particularly suitable for explaining reasons for dropping out, which refer to the individual dispositions of the learner. Its explanatory power is exhausted when third actors are involved in decisions about the training and / or when participation is linked to certain obligations (e.g. examinations). In contrast, the importance of expectations is in Tinto´s integration model very central and without them the model is only partially meaningful. In adult education, performance expectations are also relevant in some cases, but for participants they have a different meaning in life than a degree; in-process tests or certification-related tests are often completely absent. The model is particularly applicable when exam formats are integrated into the training, as these can then be relevant for dropping out. Even if Tinto´s integration model offers potential for the transferability of its explanatory power from the university sector to the field of adult education, it is not entirely suitable for explaining drop-out in adult education.

The empiricism presented here, the typology of dropout in the field of adult education deduced from it and the model for the genesis of dropout in adult education, follow the models by Tinto and Boshier and moreover they expand these models by including constellations of dropout which had not been integrated before. Our typology shares with these models' - although comprehended differently – the focus on processuality, on aspects of fit and on the interaction of individuals and institutions. Both Tinto's integration model and Boshier's congruence model clearly reveal the high significance of other actors involved in the interplay between those participating in adult education. Our typology furthermore emphasizes that dropout may occur without the individual being involved (thus, without the individual experiencing incongruence and without integration issues). Neither Boshier's psychological approach nor Tinto's sociological model can sufficiently explain this constellation of dropouts (of the type *inter-institutional non-fit* or *intra-institutional fit*). The same goes for the changes in the relation with the learning topics. While, in Tinto's model, individual interest in and attitudes towards learning topics are at best indirectly conceivable as a facet of the goal commitments (or as a facet of academic integration), Boshier completely suppresses the level of learning topics in favor of the intra- and inter-personal level of relations, thus reducing the triad of I, we, and content, described by Ruth Cohn (Gary, 2010), to its two primary components. The integrative model proposed her for the genesis of dropout in adult education extends the models of Tinto and Boshier, in particular by emphasizing the temporal dimension of dropout.

Although the dropout phenomenon can never be empirically illuminated in all its complexity for a selected sector of education, it is still possible to reveal clear research desiderata. For one thing, we lack longitudinal studies which would capture dropout in the field of adult education

systematically and which would allow to test models, like the one designed here, empirically, also with regard to their temporal dynamics. Ultimately, it is only thus that we will be able to examine causal relations, as they are suggested by the qualitative data, within a larger sample. On the other hand, we lack further studies offering a more theory-based analysis of dropout in diverse contexts. The model proposed here provides, at least for the field of adult education, such a theory-based approach. A comparison of the empirical-theoretical models, too, might also be worthwhile for the different educational sectors, in order to thus reveal similarities or peculiarities of dropout cases in the respective areas. A challenge for further studies would be to link, with regard to content, the typology and the model presented here to empirical findings from research on participation in adult education, e.g., to the clusters revealed on the basis of the NEPS data. Furthermore, it would be interesting to carry out more in-depth detailed analyses of the processual nature of dropout, also from the perspective of cumulative non-fit.

Notes

1 We use the term adult education as in the Adult Education Survey (AES) for the participation of adults especially in non-formal education, be it work related or not (Kuwan & Larsson, 2008).

2 Likewise, we have intensive scientific analyses of the dropout phenomenon in school research (cf. Stamm 2012).

3 The project "Analysis of drop-out in further education (distribution, influencing factors, effects): Development of an object-based theory perspective on drop-out" was funded by the German Research Foundation from 10/2017 to 10/2019 under the following funding number: SCHM 2391/6 -1 and HI 1599 / 4-1.

4 A comparison with the state of research made it clear that the generation of types by Stamm (2012) with regard to dropout from school had developed similar comparative categories (actors, contexts), also in an inductive-deductive manner. The difference, however, resides in the types themselves, which, in our case, focus non-fit, whereas Stamm focusses on dropouts from school as a typology of persons.

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Work pedagogy as an alternative path to adult life

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Abstract

In recent years, much attention has been paid to how young people in the 'not in education, employment or training' group can get education or work, not only to ensure welfare and social mobility but also because education constitutes an important bridge between childhood and adult life. This article discusses the usefulness of work pedagogy for young people in this transition Theoretically, the article draws on a socialization theory concept of life history and a critical theory concept of work. Methodologically, it is based on a narrative autobiographical interview with a young girl in a Danish 'production school'. This enables a critical analysis of how young people's educational participation is closely linked to life history experiences and transitions from childhood to adult life. These experiences form the basis for the young people's subsequent participation in various forms of (compensatory) adult education.

Keywords: learning processes, life history, transition, work pedagogy

Practical work as educational motivation?

> ... I want my life to be like this: I'll have a good home and nice children and a nice husband, and he should also be good at helping, and then I can sit talking to all my friends all the time, and not just sit at home getting bored by myself, and I'll get out and travel, and have some experiences instead of just sitting at home and well, I don't know...... so what's it called..... paid work, well at least I want to help people and things like that.....

This is how Line, a young Danish girl of 16, tells about her plans. A future paid job is what she mentions last and has the least concrete and somewhat diffuse notions and dreams about. Work and husband are 'out there', she is 'at home' and at this point in her life her friends get her out of the home rather than paid work. Education as a concept and activity is not discussed as part of her current future horizon. Line is thus an example of how education and work are felt to be distant by some young people. Therefore, they have difficulty living up to very strict political goals and

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demands that all young people must complete upper secondary education. This is often regarded from a deficit perspective as an isolated issue of poor educational motivation and not becoming adults fast enough. The so-called 'Danish Production School' is based on social and work pedagogy to help such young people to return to school and with their transition from childhood to adult life. As this article will argue, this process is a complex relationship between life history, the process of growing up and the notions of education and work. The aim of the article is to show how a course at a production school is part of the complexity between young people's learning, identity formation and notions of a future educational and employment career.

Methodologically, the article is based on Line's life history narrative, and the analysis exemplifies how the path from primary school to education and employment can take shape from a subjective perspective, and the possible significance of special educational offer, the production school, in this process. The interview with Line comes from a previous research project on the production school, its pedagogy and its students, where narrative life history interviews have been used (Schütze, 1983, 1984; Alheit, 1993). This project was part of the larger and broader field of life history research, which is concerned with young people's and adults' everyday lives and the subjective aspects of learning processes (Adults' lives and Learning / Life History project 1997-2004). This choice of empirical method is based on a perception that the person's life history and previous socialization process play an important role in the process of making choices regarding education and work. The total interview data (14 life history interviews) has made it possible to trace and analyse the way in which the individual young person creates coherence in an otherwise often incoherent life. There is a particular emphasis on how themes such as parents, schooling, friends, education and work are linked together and attributed importance in the transition from youth to adult, and the role played by the production school as an educational offer (Larsen, 2003a, 2003b).

The most important characteristics of the Danish production schools are production and practical work as the central pedagogical activity, there is ongoing access, there is no curriculum and the students do not gain formal qualifications. Since the 1970s, the production school has been one of the most important offers for young people who do not go directly from lower to upper secondary school. The target group is young people 'not in education, employment or training' (NEETs) (OECD, 2012). This category was introduced in the UK in the mid-1990s and has been at the heart of the European political agenda since around 2010 (Eurofond, 2016). Although Denmark has a lower number of NEETs than many other European countries, 6.5% in 2018 (Vive, 2019), there are still major challenges in young people's access to ordinary upper secondary education and the labour market (Larsen & Katznelson, 2016).

The NEET group is very heterogeneous and has many different problems and challenges, which is why the category itself can be considered problematic (Eurofond, 2016; Vive, 2019).

The students in the Danish production schools are of course also a diverse group; they may have academic challenges, psychosocial problems or generally do not fit into the ordinary educational system.

The starting point is therefore that educational courses must be adapted to the individual student's wishes and needs, and they must vary in goals, length and content. The training courses at the production school are not only structurally defined, but also in terms of content and pedagogy, with great flexibility in the tasks and a high degree of inclusiveness to accommodate students' diversity and various challenges.

The production and practical work in workshops have different historical and pedagogical roots. One is different initiatives for combating unemployment, where work in itself is considered healthy and good. Another is reform pedagogical principles of child-centred and practical teaching, and a third is the Danish public information tradition's emphasis on joint activities and the fact that relevant knowledge is not only school-based knowledge (Larsen, 2003b). The recent increased focus on practice learning and situated learning has led to some production schools also drawing theoretical inspiration from Lave and Wenger (1991) and Wenger (1998). Emphasis is placed on establishing communities of practice that strive for different legitimate participation opportunities for students. Whether the practical and social communities in the production school function as actual communities of practice must be an unanswered question here. The point is that

learning is perceived as a matter of situated participation in social practice, where participation in various everyday practices is highlighted (Colley et al., 2003).

In this way, the production school will contain a duality connected to the individual organization of the courses: On the one hand, the starting point is the participants' experiential world, which is closely linked to a reform pedagogical way of thinking. On the other hand, there is an individualization, division and independence of the activities. For example, practical experience with professional elements in different workshops does not necessarily lead to a desire to learn more, and if the motivation for further learning increases, it may not be primarily the desire for formal qualifications (Larsen & Villumsen 2012; Larsen 2013).

The production school as an educational policy instrument

Since the early 1990s, the production schools have been an important element in the educational policy strategy of 'education for all young people'. This strategy has in recent years has become stricter; it was previously based on motivation and voluntariness, but is now based on orders and requirements. Denmark is one of the Nordic countries that formulates the requirement for education and employment for all, as far as possible. This applies especially to young people in the NEET group. Here, Denmark differs from other Nordic and European countries by having introduced a national target that 95% of a youth cohort must complete upper secondary school (Larsen & Katznelson, 2016; Jørgensen, 2018).

Since the Danish production schools started in the mid-1970s, there have been significant changes in policies, objectives, and in the education's self-understanding. With the latest changes in the law, we see an increasing degree of business direction and goal orientation, and the production school must form a bridge to vocational education in terms of both practical and academic prerequisites. The latest change was to bring together various educational offers for NEETs in 2019 under a common institutional framework called Preparatory Basic Education (FGU). This education has three tracks: general, vocational and production basic education, where the latter builds on the workshop pedagogy in the former production schools, but there has been more focus on systematic teaching in ordinary school subjects. The aim is to motivate young people, whose progress will give them the experience of acquiring new skills and solid work habits that will help them take responsibility for their future adult life (Danish Government, 2017). Through changes in legislation and an increased emphasis on the educational significance of practical work, this program has increasingly acquired the character of an actual educational institution. This further changes the task in the direction of motivating and preparing 'non-academic' students for the ordinary education system, including improving their academic skills. In other words, there is no bridge between childhood and adulthood if a person does not go to school.

Choice of education as transition and sorting

Compared with other countries, the Danish education system expects young people to choose very early between high school and vocational education (the dual system). This means that about 75% of young people today choose upper secondary school with a view to postponing their final choice for three years. It is considered 'the safe choice' or 'the natural choice' (EVA, 2013), and there is a strong political focus on vocational education and various initiatives on how to make it appear more attractive. This choice can clearly not be seen independently of its link to society, where both social background and the education system itself play a key role and determine the possibilities (Domina et al., 2017). The example of Line below shows how a life history approach provides an understanding of some of the complexity that lies in the relationship between young people's background and their orientations towards education and work. For example, Line primarily makes the production school a space for interactions, whereas it is more difficult to see if and how she qualifies professionally. In this context, life history is conceptualized as a subject-

object dialectic, where the subject is constituted and perceived as a dynamic structure of opposites that lead to ambivalence and lines of consciousness in which the dynamics of learning processes are embedded. A life history approach to qualification, education and learning indicates not only the potentials and resources of the participants, but also the frameworks, structures and conditions that may seem to block these (Salling Olesen, 2004, 2016, 2017a).

This concept of life history is inspired by the theory of socialization. In continuation of Lorenzer's work, the life story is seen as a series of contradictory interactions between an immediate outside world, which itself is structured by societal contradictions, and an individual, who itself is a contradictory structured product of socialization (Lorenzer, 1972, 1986). Biography is a concept for the synthesizing narrative of life history, which on the one hand contains harmonization of conflicts and contradictions but which on the other hand can contain drafts of utopias in a more or less rudimentary form. The biography represents in principle a 'dynamic life lie', but it is in this dynamic that learning processes take place, and it is through this they become important to the individual (Salling Olesen, 1996, 2016, 2017a). The biography understood as the narrative of the life course contains elements of identity production in that events are reflected, linked and interpreted. The narrative's relationship between the events as they took place then, and as they are told now, contains an important basis for interpretation in relation to the interviewee's self-understanding and the world around her, i.e. the narrated story is perceived as a source of identity processes and analysis of these (Schütze, 1983, 1984; Alheit, 1993, 1994).

In continuation of this, the analysis below takes a socialization-theoretical perspective on young adults. This means that the starting point is youth as a social group that arose in step with the development of capitalist wage labour, and the development of youth is considered as part of the societal individualization process that has been intensified with the separation of production and reproduction, i.e. work and childhood/family. In addition, young people are perceived as a culturally determined phase of life, which includes identity processes, such as the development of gender identity, and the solution of psychological tasks. These processes cannot be understood exclusively in terms of developmental psychological categories but must include an understanding of unconscious processes and dynamics, i.e. they must incorporate concepts and categories from psychoanalysis and socialization theory. Finally, this means that young people's cultural expressions and contexts are seen as spaces for relationships and interactions and as places where conflicts and ambivalence are processed verbally, symbolically and aesthetically (Larsen, 2003b).

The educational imperative implies that educational institutions have become the central and obligatory places for young people to stay, where their psychological tasks must be solved Transition research states that the path from primary school to employment has become less linear and more complex, and that transitions in general are increasingly changing and will take the form of complex zig-zag movements (Wyn & Dwyer, 2002; Walther, 2006; Cuervo & Wyn, 2014). Life does no go by a string – not even for adults. At the same time, educational policy initiatives are based on targeted, effective and linear transitions, which do not make young people's transitions from youth to adult easier to handle. In addition, young people's lives consist of much more than individual transition and are largely about how the various types of programs manage to create belonging and participation opportunities for different young people (Larsen et al, 2016).

Thus, the sorting function of the types of education is reflected in young people's perception of the programmes offered (Larsen & Thunqvist, 2018). The sorting and thus the question of equality and inequality to enter and within education is a well-known theme in the sociology of education. In parts of classical sociology of education, the question is grounded in functional analyses that show that one of the most important societal functions of the education system (besides qualifying and socializing) is to sort students. This happens e.g. through recruitment to education, through differentiation in education levels and through grade and reward systems within the specific programmes (Masuch, 1974; Bernstein, 2001; Salling Olesen, 2011). Others point out how classifications and categorizations in themselves lead to sorting and thus to inequality (e.g. Bourdieu,1996.) A newer American study uses the concept of 'category inequality' to show how three significant processes in the education system create inequality: 1) the reproduction of existing social categories, 2) the creation of new categories and 3) the allocation of individuals/students to these categories (Domina et al., 2017). In other words, the education

system reproduces, produces and structures in various ways social inequality through categorizations of young people (Larsen et al, 2020). These categorizations and inequalities pursue young people further into the adult education system.

School fatigue and practical work

In general, in the Danish educational tradition, practical work is considered as an important pedagogical response to school-weary and non-academic students and a suitable means of supporting this group in choosing education and work. This applies to the production school in particular with the production and work as a focal point for the activities and the students' learning processes.

Line is, as mentioned initially, 16 years old at the time of the interview and has not made an educational choice, but has some imprecise ideas about a future job. She lives in the small provincial town where she grew up with her parents and two older brothers. She starts 8th grade in a so-called alternative class, which includes practical work. She has gone to several support classes, the last of which contained a number of practical subjects, which meant Line got tired of going to school and found it difficult to get out of bed in the morning:

> But then in the end they talked to my mother at the parents' meeting, well then things went better again, because I could see that was a stupid way to do it... ... but what wouldn't you do to get rid of it....?

What 'it' is that Line wants to get rid of remains unspoken and embodied. It is not just about mentally wanting to get rid of it; she physically wants to get rid of it as well. She has particular problems with mathematics, whereas she likes Danish, English and reading books. Line says that you go to school to learn to count, read and write, which she actually wants to learn. Otherwise, she says virtually nothing about her previous schooling, and her other experiences are subordinate to the concept of 'fatigue', and she expresses frustration that the school cannot teach her basic cultural techniques. However, she perceives her school fatigue as her own shortcoming, which she is powerless to prevent.

Primary school has thus not managed to give Line a schooling that contains sufficient closeness, security and peace for her to learn enough literacy, and she has difficulty articulating her previous schooling. She even cites her major school fatigue as the reason she comes to a production school after 9th grade. Here she works in the wood workshop, and finds the work there boring and monotonous:

> Well I mean it's okay to be there, but you often do the same thing over and over again.

In Line's view, the production school is good enough, but in her criticism of the work in the workshop, she points out the procedure of constantly having to do what the teacher has noticed a student is good at. What Line likes best in the workshop is to sew the fabric for furniture to be upholstered and to sew it on with *'small, fine, invisible stitches'*. She comforts herself with the thought that she will sew again in a few days, when she has finished all the tedious sandpapering work. In this way, she harmonizes her ambivalence in relation to the work. The interviewer asks if she would not rather go to one of the other workshops. In response, Line formulates one of her longer and more precise passages:

> Well, when I was up in the kitchen there, it was just stupid, because there was nothing to it, we just had to cook all the time, and you cried five times a day, because you had to peel onions all the time. Then I went to the media class, and that was nothing too, because you just had to sit there and connect to a computer, so then I came down to the wood workshop, and I found that exciting, so I liked it and so I went there, and so did Charlotte, because it was her place too. She hasn't regretted it, except that she often quarrelled with the teacher,

> but well, I don't know, it may well get better if I get to do something different, I just think it's because I've done the same thing almost all the time….

Line has an ambivalent relationship to the work in the wood workshop, but she likes some of the other workshops even less, and she chooses the wood workshop due to her interest in the subject and inspiration from her friend Charlotte. Charlotte has given Line a bad impression of the production school beforehand, but she has not regretted her choice of workshop, only that she quarrels with the teacher. However, she still feels that the production school is a good place, and she thinks it is fun to sew. In other words, the two friends have opposite experiences of the production school and working in the wood workshop. Line tries to harmonize the contradictions she personally experiences with her desire and hope of doing some more varied work in the workshop.

Line expresses her reaction to the different workshops by saying that there is a lot of boring work and that the kitchen and IT are certainly not something for her. In the production school, it is important that students receive recognition for their efforts based on the quality of the goods, which must achieve normal market standards. This is important to Line, as she likes to sew fine neat stitches. Part of her motivation for working in the wood workshop is that chairs are produced for a local nursing home for the benefit of the residents. The point here is that work, in contrast to the school's content and communication of knowledge, is presumed to have subjective significance in the intertwining of the concrete pleasure of doing something and the notion of usefulness and meaning shaped by paid work (Salling Olesen, 1981). However, Line does not mention this aspect of the work.

There is little to suggest that Line is significantly better equipped than when she started at the production school in relation to the school's aim of motivating students for education through practical work and providing a sound basis for completing vocational education. She certainly learns something useful in the wood workshop, but she does not attach importance to it, and her interest in sewing has apparently not been supported by the production school. Line does not show equal enthusiasm for other subjects, nor does she test other areas where the joy of neatness and precision can unfold. Further, Line does not state whether she believes she has become better at mastering cultural techniques. She does not say whether she has joined a class of general subjects, and she does not emphasize the integrated teaching in the workshop (observations in the wood workshop showed that the teacher attaches great importance to this, and the students practice basic arithmetic skills by e.g. measuring materials).

At one point, Line planned to become a furniture upholsterer, but the lack of practice placements means she may risk having to move to another part of the country. She therefore changes her mind: '*And I don't want to, of course, when my friends are here'*. She thus feels she cannot do without her friends, rather than her boyfriend; instead she chooses 'something with people'. Line's narrative exemplifies a general situation where her impending entry into employment can be perceived as a crisis phase, in which young people will have to relate their life story to the demands of the labour market in a way that maintains their identity to some extent. With the transition from school to profession, socio-biography becomes relevant, and the past is involved in young people's choice of profession, where decisions are made based on experiences that are justified biographically and thereby equipped with subjective meaning (Heinz, 2002). 'Something with people' is for Line 'reasonably secure' as she can continue living near her friends. It is realistic in relation to her school knowledge, and it draws back on experiences of closeness, relationships and intimacy. This can be interpreted as Line's belief that it is not the work which is meaningful, but that someone is interested in her and in her future plans that make an impression. The question is whether Line has become more motivated for education, which she knows is a requirement for becoming an adult.

Absence of education and work

In the process of choosing education and work, including imagining a future paid job, young people often resort to events and relationships in childhood.

The teacher at the production school has given the students a booklet with some questions to answer regarding themselves and their future plans, and Line reads from the booklet, where she has described her future plans:

> Well, what's it called, I wrote that I'd like to do, you know, what's it called? Nursery or something, I'd like that, or go to a nursing home, like that....

She also reads:

> I want a nice family with two or three children, a nice house, with nice furniture, a dog, a husband who's loving, honest, good at helping at home, I want a nice job that I am happy with, but we'll have to see how things go ...

She elaborates more specifically in the introductory quote to this article, where, as mentioned, work comes last. Her distance to work is expressed with the words *'so what's it called..... paid work... '*. Work is placed within a family horizon, where she formulates a romantic dream for the future. A Danish cultural sociologist (Jørgensen, 1985) talks about 'the culture of the romantic dream' in some girls, which is structured by both patriarchal notions about the subordinate and indispensable role of women in society and the family and by the young girls' own experiences from friendships regarding good female qualities. For most of these girls, work has a secondary place in their future plans, where a defence system of non-planning is built in. Time as a process does not exist, but is formulated as highlights in life in the form of romantic images of husband, children and dog. They also romanticize work and associate it with the positive experiences of the female norm (Jørgensen, 1985, p. 22-24). For Line, work also has a secondary place. She does not make specific plans for her future, but instead has some dreamy ideas about how she would like life to be.

Line wants a 'nice job'. She perceives working in a crèche or nursing home as 'helping', which is linked to the culturally produced female norm and care work:

> ... I like to talk to people about their problems and so on, so if they ask me for advice, you know, I try to tell them what I would do if I were them, not to tell them to do it, but I'd reckon it was best, then they could think if they could use some of it, you see, or if it was completely stupid, and then work out a plan yourself, like in a hospital or nursing home or crèche, I'd like that, but mostly a crèche ....

From where Line has these images is unclear. It may be from talking to friends, from counselling sessions, and it may be an expression of her perception that she has lacked proper help and guidance herself. It is characteristic she expresses notions of equality in relationships, but does not mention other aspects of care work. Although care work consists of emotions and relationships, including helping, it varies considerably. It can also be tedious routine work of changing many nappies every day, helping old people get dressed, etc., and it is also stressful work. Line has no idea of these dimensions of work, as she has no experience of them. Line imagines her desire to help can be realized in a hospital, a nursing home or in a nursery, but she finds it difficult to decide between young children and elderly people. Therefore, the interviewer asks:

> I: 'But there's a big difference between caring for old people and such small children?'

> Line: ‘Yes...there is, but I think mostly I’d like work with little children…but you know…old people are also, I think there are lots of very nice old people…every time someone comes and talks to them, they brighten up.....’

Within Line's horizon, there is not much difference, or at least she cannot formulate it. Her notions of equality in conversations mean something crucially different in relation to children and the elderly; she has apparently not reflected on this and her perception of older people is formulated within the horizon of ‘nice’, which implies that they will be nice to her too. Nothing in the interview suggests that the 'booklet' works as e.g. log books are supposed to work. She does not reflect on the relationship between herself and her perception of care work or on how this is included in her identity processes.

Line is also an example of how a lack of practice placements can support segmentation in the labour market. If there had been a local placement in the upholstery profession, she might have maintained this interest, and a positive connection between the production school and vocational education could have been created.

Work for Line remains something involving emotions and relationships, and her somewhat diffuse notions of helping are generally far removed from the conditions of care work. Similarly, her notions of husband and children are far from what many women achieve in reality and probably from what she and her current boyfriend will be able to achieve too. In other words, Line makes a biographical construction that creates continuity and coherence in her life, where her future plans can be seen as a continuation of childhood family life and indifferent intimate relationships, which are a central element in her identity work towards becoming an adult (Larsen, 2010).

In this way, Line shows that it is not through the practical work in the production school that she becomes (much) better at academic work, as the work has little subjective significance for her. She expresses a need to work with e.g. jewellery and clay across the workshops, which can be interpreted as a need to work aesthetically and symbolically and to mediate between unconscious meanings and symbolic forms of expression and thus open her horizon. She also expresses an interest and need for social interaction; here, the challenge for the production school is to establish work situations where Line connects as subject to object and which contain a social element and interaction context in connection with work (Negt, 1984).

School as a space for emotions and relationships

For Line, going to production school is not (only) a matter of progressing in the education system. Importantly, it is also a space for social relations inside and outside school, both as compensation for lack of sociality in primary school and as part of the transition from child to adult. Line has a close relationship with her mother, and she remembers her childhood as good and safe and it is her mother she talks to about the production school and her future plans:

> ‘Well, I think at least she’s a good mother, and she’s also the one I tell the most to, so you might kind of say she’s like my best friend too’.

She makes a comparison and a series of arguments, where her mother is the one she tells the most to, therefore her mother is good, and the person you tell the most to is your best friend. In an attempt to maintain intimacy with her mother, Line establishes a friendly relationship, which apparently makes it difficult for Line to break away from childhood relationships and to establish adult relationships, and her mother reportedly has difficulty giving up her youngest child.

Efforts at autonomy in puberty often take place in close relationships between girls, where a new form of dependence and intimacy is established. The friendships provide opportunities for independence and demarcation in relation to adults, but at the same time, the fundamental conflict between autonomy and love also appears in the friendships (Nielsen & Rudberg, 1991, 1993). Central to Line's orientations in relation to the production school are also relationships with other girls. Line and Charlotte have been friends for many years, and at one point, the 'classic' conflict

between female friends and boyfriends occurs. The close friendship ends when Charlotte gets a boyfriend:

> We also knew each other since school, and then three and a half years ago, we were every day all the time, and ... either I was at her house or she was at my house, we were always together, but then she started going out with someone called Jens, so then it ended, because then she had him to care about, and then I also had other friends, you know...

The female friend seeks autonomy through her boyfriend and the intimate relationship between Line and Charlotte ends. The phrase *'then she had him to care about'* expresses Line's blurring of a painful separation and contempt, while also containing the inevitability of separation. For example, she does not say that Charlotte would now rather be with her boyfriend, but instead more generally that boyfriends require attention, and Line also mentions her own '*other friends'*.

Occasionally they met in town, and kept in touch, and at some point, Charlotte begins at the production school and they become good friends again. Charlotte has dropped her boyfriend, and Line says Charlotte later went back to him, but in the meantime, she has a boyfriend herself, and the harmony is restored.

At a late stage in the interview Line introduces her boyfriend and in a context where he helps to support and maintain the relationship between Line and Charlotte. The interviewer tries to get Line to talk about her boyfriend, who also goes to the production school. This succeeds only in the form of very short answers to precise questions:

> In: 'And your boyfriend is.....?'
>
> Line: 'Kim'
>
> I: 'Do you talk to each other during the day ...?'
>
> Line: 'Me and Kim?'
>
> I: 'Yeah'
>
> Line: 'Yes, yes, we talk during breaks and after school and so on....'

Kim started at the production school before Line, but Line does not mention that in connection with her previous impression of the production school. She only says he had recommended the kitchen because he himself liked it, and because then they could be in the same class. However, Line opted out of the kitchen, regardless of her boyfriend. After that, she only talks about her boyfriend twice, in both cases when asked directly if they have gone to school together:

> In: 'Were you in the same class as Kim?'
>
> Line: 'No but we knew each other before I started there, because that class was just below ours, there was me, and then a girl called Rikke, who I was good friends with at the time, then she started to go out with him, and then I started talking to him and his friends, so in the end it was just that whole big gang that got together somewhere and just sat and talked .... '.

Line's talk (again) moves away from her boyfriend and to a larger group of friends. In other words, her boyfriend acts here as access to a larger youth community, which is important to Line and her transition processes.

When the interviewer finally tries to get Line to be specific about her general and abstract future ideas about her husband and children, she says:

> Line: '... I'll marry him someday and have lots of children. He's already said we'll have 13 children ....'

In: ‘Really, and then?’

Line: ‘I just think I’ll set a limit there.’

She says this with a smile on her face. Line refers to her boyfriend more as access to friends and family life than as access to an adult, sexual relationship. Line seeks intimacy and a sense of community with her friends, whereas her boyfriend is less involved in her attempts to gain autonomy even though she thinks marriage and children are an important part of her adult life.

Line is thus busy solving the youth task of going from child to adult with the psychological and social processes this entails, such as liberation from her parents, profiling of a gender identity, participation in youth communities. Ziehe (1999, 2005) underlines that development of individuality and identity is far from an individual project, social recognition is important and it is together with others that one sees oneself. Individualization is neither a psychological fact nor a way of life, but a historical social unit, where having to find one's way through life has become a normal expectation and a socializing framework within which one must make some decisions regarding one's life. It is a ‘permanent biographical issue’ to relate to who one is and whom one identifies with.

The students' emphasis on the social communities (Larsen, 2003b) can be seen as an expression of their need to be part of 'normal' youth life as well as for a sense of intimacy and community that supports the development of adult relationships and allows for the fact that the contradictory situation the young people are in can be processed concretely and symbolically. The working communities in the production school are not necessarily sufficient, as they follow the logic of paid work and only rarely form the basis for collective learning processes. In addition, some of the work done might in principle connect young people with society, but this does not always happen in real life. Nor does it necessarily allow them to connect with themselves and the immediate object of interest. This problem becomes even clearer in relation to the closer connection to vocational programmes which follows from the latest education reforms in the field.

Time for being an adult

In conclusion, the analysis of Line shows that she is in a workshop that is scarcely relevant to her vocational wishes, and there is no clear, targeted preparation for a vocational education. A key factor in this connection is that a narrower and more targeted connection to vocational education does not necessarily create greater educational motivation. This refers to research on lifelong learning that shows different kinds of barriers and defence against the contradictory imperative of learning and competence development (Salling Olesen, 2013, 2017b). Further, it emphasizes the transformation of lifelong learning from a right to a duty (Biesta, 2006).

The analysis also shows that young people are not easily challenged by changes in laws and reforms. With these changes, some completely different rationales and processes emerge, such as Line’s search for emotions and relationships and the difficult process from child to adult. Young people who form part of NEET statistics often have very complicated life situations with challenging transitions from youth to adulthood with high human, social and economic costs (Olsen et al., 2016). The life history angle clearly shows how young people express themselves and the driving forces in their learning processes. This example reveals that Line most of all lacks help and support to become an adult, as a prerequisite for an upper secondary education and a job. Lack of educational motivation and ‘academic difficulties’ are thus not only external parameters in relation to starting and completing an upper secondary education, but are involved in a complex school and life history (Salling Olesen, 2004; Olsen et al., 2016). In addition, the education system is far from monolithic, but a hierarchical field of power that is both complex and differentiated. For young adults, it is therefore of great importance where they are in the education system and how their path through it appears. Hierarchies within and between educational programmes constitute in themselves a differentiating factor, which means that education offers different opportunities for young people who are at different places in the education system

(Jørgensen, 2018) On the one hand, education has hegemonic status as a central part of the normal biography and the notion of a good life, but on the other hand, education in practice is not available to everyone. The experiences people bring into different kinds of adult education are essential prerequisites for opportunities to participate, and these experiences are reactivated as dynamics in learning processes as adults.

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Continuing education as value creation: Towards a new orientation beyond market logic

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Abstract

The continuing education sector explicitly regards itself as serving the goals of lifelong learning. In fact, however, it is oriented towards the market and measures its success according to the sales of its products. The article analyses this market orientation from the perspectives of educational sociology and discourse theory and illustrates its consequences using examples from the Swiss continuing education market. The author develops an alternative approach whereby continuing education is measured according to the value it creates for individuals and society. Here, a connection is made with economic value creation theory, enhanced by sociological dimensions of the recognition and valorisation of education. This enhanced value creation concept shows how continuing education generates values, where these values are recognised, in what contexts they are valorised and what players and discourses are involved. The author also outlines a procedure for value creation analysis and, using two continuing education programmes as examples, illustrates the findings that value creation analysis can generate. On this basis, the author calls for a reorientation of continuing education that transcends the limitations of market logic.

Keywords: value creation of education, education markets, programme marketing, valorisation of education, education inequality, education discourse

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Introduction

The starting point of this article is the general observation that adult and continuing education are oriented towards the market, to a much greater extent than is formal education. The structural adaptation to market mechanisms has already been addressed in several issues of *RELA*, under the theme of 'marketisation', for example. Marketisation, which is apparent both in Europe and around the world, has been linked to the neoliberal turn in economic and educational policy (see Fejes et al., 2016; Košmerl & Mikulec, 2021). This article now addresses *market orientation*: the market-oriented strategies deployed by continuing education market players and the market-oriented valuation of continuing education performance in societal reference systems.

In continuing education, a market orientation means that activities are guided by the competitive environment of the market and measured according to performance and economic efficiency. Hence, market success and commercial viability become central evaluation criteria, which are, for example, decisive in whether programmes will be offered and whether they will receive state support and/or social recognition. The market thus becomes the highest evaluation authority. It follows that providers of continuing education in general (and, in large part, also of vocational education and training) concentrate on perfecting product marketing and increasing market share. In this context, it is powerful market players who define whatever will currently constitute the 'market' on the supply side, i.e. the range of products, market segmentation and performance criteria. Market orientation thus not only shapes the self-image and business lens of providers but also affects course development dynamics, continuing education attainments and their evaluation. However, the 'market success' of continuing education programmes actually says little about the contribution they make to the learning of individuals and society and thus neglects key elements of the value these programmes create. Might there be an alternative orientation and evaluative rationale for continuing education that deploys criteria that are not subject to the rules of market logic?

Research questions and argumentation

Two research questions were derived from the issues outlined above. (1) How is a market orientation realised in continuing education, and what are the consequences for the range of courses offered, the associated attainments and how these are valorised in the economy and society? (2) How might a contrasting, alternative approach measuring continuing education and its performance by the value they create for learners, the economy and society look?

The first section of the article focuses on *research question 1*. It analyses the political and economic mechanisms and discursive explanations of market logic in continuing education. It shows how market orientation shapes the dynamics of course development, marketing practices and innovation undertakings in the sector, and how it influences the distribution of opportunities to access continuing education. It also highlights how powerful market players exploit performance outcomes in continuing education for their own ends, e.g. in the labour market, corporate policy or economic location policy. Trends in the Swiss continuing education sector are used as illustration.

The analysis clearly shows that continuing education organised on a market basis generates a very broad commercial range of qualification courses, but also that its focus on marketing causes it to neglect the long-term outcomes and value contributions of learning. A commercial course offering is partially volatile, education paths can become

unstable, and acquired certificates can decrease in value – all of which contradict the principle of lifelong learning. It is also clear that continuing education under the market regime weakens its own aspirations to offer a ‘second chance’ to all and to enable ‘free access’ to education, realising them in sub-areas at best.

This leads to *research question 2*: What alternative approaches would measure the values generated by continuing education? As a first step, the article explores how far economic value creation theory contributes to an understanding of ‘education value creation’. It extends the value creation concept by relating it to the systemic and societal contexts in which education operates. It follows that a value creation concept suitable for education processes must, in addition to the value product targeted in the education business, consider the value contributions of the relevant reference systems. It shows how continuing education yields its results, in which systems these find recognition, in what contexts they are valorised and what discourses and players are involved.

Based on the value creation approach, the article then outlines a multilevel procedure for analysing value creation in continuing education programmes. Using two authentic programmes as examples, it illuminates the insights that value creation analysis can provide regarding potentials, deficits and courses of action. These two ‘cases’ provide insights into the applicability of the value creation approach in education. The discussion section examines the findings and addresses both the value added by a multilevel value creation perspective and the challenges such a reorientation would face in a continuing education sector that is currently organised on a market basis.

Theoretical foundations and methodology

The analysis of market-oriented continuing education *(research question 1)* draws upon findings of continuing education research and observations of trends in the Swiss continuing education sector. These findings are evaluated using theoretical dimensions of the education system (see Weber, 2013; Schöni, 2017, p. 59), which include equity of needs in course provision; coherence and connectivity of education paths; and equal opportunity of access to education. These dimensions serve as a means to assess trends observed in the sector and their consequences, e.g. forced product marketing, web-based data collection, the conditioning of market demand and effects on innovation in course development. They also point up the hazards to legitimisation, which can stem from a rigid market orientation.

The programmes offered by market-oriented continuing education lead target groups to expect benefits, e.g. individual career steps, more competitive companies, better labour market structures or solutions to social problems. Empirical evidence of such outcomes is generally supplied by selective graduate surveys, programme evaluations and monitoring studies. However, there is a lack of thematically broad-based, longitudinal studies and repeat surveys of education biographies and structural characteristics on the basis of which continuing education might continually review its outcomes (Fischer & Kade, 2012; Ioannidou & Reichart, 2017). This data deficit does not seem to interfere with the success of continuing education marketing, however (Wittpoth, 2021).

If continuing education is legitimised less by empirical evidence of benefit than by its discursive staging, this calls methodologically for a *discourse analysis approach*. The analysis of education discourse (Rausch, 2012; Forneck, 2007) assumes that the effects of continuing education evident in the individual case will be embedded in narratives and generalised. Narratives unfold symbolic productivity by illustrating

outcomes, for example, in testimonials, and urge their audience to position themselves in the competition via educational effort. Narratives provide symbolic resources for deployment in marketing. They are often closely associated with power discourse, as the affinity of continuing education with neoliberal achievement morality has shown.

The *theory of economic value creation* (e.g. Stauss & Bruhn, 2007) offers help in elaborating a new approach that measures continuing education according to the value it creates *(research question 2)*. This theory is applied to personal services, where providers and their clients together generate values of various types according to a service concept. The methodology of value creation analysis has been implemented in case studies in various sectors (e.g. Woratschek, Roth & Schafmeister, 2007), although these have only rarely included education. Educational services present a particular challenge to a value creation concept because the client is directly involved in service provision as a learner (see Schlutz, 2006, p. 19), and the results require external recognition. The concept of value creation in education must therefore be extended with *educational sociology perspectives*, which take into account the normative basis of teaching and learning, its embedding in social interactions and its validation in societal reference systems as determinants of value (for the social valorisation of learning outcomes, see Becker & Hadjar, 2011, p. 44).

The market orientation of continuing education – and its consequences

According to the current self-presentation of continuing education, it is the requirements of lifelong learning that steer the development of the continuing education sector and its offering. The sector looks ahead and makes available learning opportunities and courses that enable adults to satisfy their learning needs and update their qualifications in a time of structural change to the economy. In this discursively constructed 'order of things' (Reckwitz, 2011, p. 302), continuing education traditionally sees itself as a generator of benefits (Rosenberg, 2015, p. 134) and as a 'formula' for social consensus (Klingovsky et al., 2020): it offers everyone a 'second' chance at education, facilitates cumulative further learning, supplies the labour market with qualified workers and strengthens the competitive ability of the economy. In this way, it serves as an instrument for combatting social division and economic stagnation. Continuing education *research* has examined just how far these discursive claims are actually realised, and, in addition to the actual functional accomplishments of continuing education, has noted incoherencies and dysfunction (see summaries in Becker & Hecken, 2011, p. 382; Tippelt & von Hippel, 2011; Tippelt, 2020, p. 68). Be that as it may, considerably less research attention has been paid to the fact that, in reality, the continuing education sector is driven less by the requirements of learning and the findings of qualification evolution research than by the market and its 'principles'.

This article's analysis of market orientation and its consequences *(research question 1)* references, inter alia, the *Swiss continuing education sector*. Here, continuing education, understood as non-formal education, covers programmes of general and professionally oriented continuing education and programmes (not certifications) of higher vocational education and parts of university continuing education (Fischer, 2014, p. 24). Features of the continuing education sector include the dominance of private providers and corporate players (see Geiss, 2020, p. 228; Schläfli & Sgier, 2014, p. 38); a strongly segmented supply market with socially unequal opportunities of access (see Weber, 2007, p. 307; Weber, 2013, p. 29); significant financial burdens for clients, i.e. participants and employers (see Messer & Wolter,

2009; Schweizerische Koordinationsstelle für Bildungsforschung, 2014, p. 274); and relatively little financial engagement on the part of public authorities. The federal government regulates competition in general, but controls the qualification system only by sector (e.g. in higher vocational education with qualifications at tertiary level B). Otherwise, it leaves the regulation of education to the federal units (cantons, municipalities) and the associations. It acts as a subsidiary and practises restraint with regard to education policy (see Fischer, 2014, p. 15). This regime, established over decades, is formally anchored in the new national federal act on continuing education of 2014. The Swiss continuing education sector thus exhibits characteristics of 'marketisation' at all levels (Käpplinger, 2019, p. 4).

Market logic determines what continuing education offers

The market orientation of continuing education was strengthened towards the end of the twentieth century by an international economic policy influenced by neoliberalism, which propagated the advantages of vocational education and training based upon market principles and market operation. This doctrine and its basic concepts were implemented all over Europe and worldwide in country-specific continuing education policies, systems and practices (see Košmerl & Mikulec, 2021, p. 48; Käpplinger, 2019). Other fields of activity, and particularly other programmatic objectives of continuing education (associated with unions, social reform, churches or democracy, for example), receded into the background. Today, the development of continuing education programmes in general, and largely also that of vocational education and training programmes, is determined by trends observed in the market, gaps in qualification systems and competitive sales strategies (Gillen et al., 2010, p. 21).

However, 'market orientation' does not mean that supply reacts to the infinitely varying demand on the open market; it responds far more to the product portfolios, market segmentation and performance goals defined by powerful market players and adheres to the specifications of the market regime. In Switzerland, it is corporate providers of education, educational institutions, important client groups and professional and labour market rules that regulate continuing education segment markets and render market access conditional (Geiss, 2020). In practice, market orientation means that continuing education providers take preservation of competitive position, conformity with market-defined rules and exploitation of market share in their segments as their maxims in deciding what to offer. They justify claims for recognition and (if applicable) for state funding by citing their own performance. Weber (2009, p. 68) speaks of a 'providers' logic' that has proliferated in continuing education at the cost of 'loyalty to the educationally willing subject' and the coherence of the educational process. For providers, the positioning and marketing of the educational offer take precedence, while the needs of the target group, opportunities of access and continuing education outcomes take second place – with far-reaching consequences for practice. The latter consequences have as yet received little research attention (Fejes & Salling Olesen, 2016), but are eminently visible, as illustrated below.

a) Market analyses replace the clarification of needs and objectives.
In principle, the adult education profession knows how learning needs are identified and how learning content and curricula may be derived from them. Practice, however, is increasingly diverging from the associated standards. Providers now organise their programmes into marketable product categories, frequently by alluding to 'megatrends', labour market expectations or competence catalogues (created ad hoc). They assign to

products the bundled learning needs of stereotyped clients: the unskilled require catch-up training, mobile staff need intercultural skills, younger management personnel want coaching and sparring partners, digital natives prefer mobile course units, etc. (see Schenkel, 2019a; Schöni, 2017, p. 61, p. 250). This practice is stimulated by web-based data collection, which has potentised the possibilities of market observation over the last few decades (Schenkel, 2019b). Mass data on user behaviour compiled from the internet is condensed into user profiles ('online profiling') upon which market segmentation and targeted customer contact are founded (see Bernecker, 2020). Market analyses identify client groups, address them and test their product 'preferences' in order to estimate demand. Supply and distribution are planned accordingly. Learning needs are thus *constructed* with marketing tools rather than identified in cooperation with target groups according to the standards of the profession.

b) Education marketing steers demand towards supply.
Education marketing follows the example of product and service marketing in other sectors. It approaches learners as consumers and urges them to select from a range of attractive products and services in order to improve their career and income prospects (Forneck & Franz, 2006, p. 227). The fact that learners must contrive every benefit and positive outcome is hardly mentioned in the marketing message. The tools of education marketing, i.e. profiling, a personalised client approach and the distribution of programmes via digital channels, are also drivers in the continuing education business. Here, the leaders are no longer large institutions of continuing education, but enterprises from outside the sector, namely companies of the digital economy, which deploy their technical networking and data analysis edge to full advantage (particularly at a time of economic slump and lockdowns). Effective product and service marketing in digital media and networks is therefore also becoming a core competence in the education sector (Grotlüschen, 2018). Such marketing stimulates and conditions demand, but it does nothing to make continuing education itself more needs-appropriate or effective. Rather, it tempts providers to make sweeping promises about the skills their programmes supply and to pay even less attention to the particular needs, learning paths and learning outcomes of their programme participants (Schöni, 2020). Participants must in fact assume responsibility for identifying the programmes or courses that suit their needs and for evaluating the impact in their field of practice.

c) Programme innovation targets strategic differentiation and not coherence.
The continuing education market produces a varied, dynamic range of programmes. No central planning body would be capable of this. However, the sector partly demonstrates erratic innovation behaviour, which is driven less by new educational objectives than by competition for solvent customers, public contracts and subsidies. Providers read 'market signals', seek 'market niches' and translate their findings as rapidly as possible into marketable programmes – all the while trying to rise above the competition by deploying (basically arbitrary) devices, such as marketing or distribution innovations, minimal development times or strategic selection of topics. Their goals are market segment leadership, short-term sales advantage and economic viability. Coherence in the education sphere is not their primary concern, and conformity with existing education regulations is simply the price they pay to gain access to the market. Thus arises a continually rarefying, partially volatile range of continuing education options and education paths that frequently compete with one another (Weber, 2013, p. 28; Schöni, 2019). The consequences for continuing education participants are sometimes a

lack of connectivity in the education system, unstable educational qualifications or opaque pricing and service concepts.

d) The supply structure exacerbates social disparities in education.
If providers position themselves according to user profiles identified by market analysis, the selective demands of institutional clients (companies, administrative bodies) and the variable needs of the labour market, this will have an effect on the distribution of educational opportunity. For example, companies will anticipate higher net benefits by investing in already well-qualified staff (Schweizerische Koordinationsstelle für Bildungsforschung, 2014, p. 276; Borkowsky et al., 1997, p. 29), and the supply structure supports this selective behaviour. Products are differentiated according to the target groups' ability to pay and the assumed return on earnings from the educational investment. This is evident in strong vertical and horizontal segmentation, where programmes are categorised by qualification level, progression options, convenience factors and price, making it more difficult for persons from certain occupational and income groups to access them. Unequal continuing education opportunities contingent on educational level, gender, age, nationality and branch of industry are the result (Offerhaus et al., 2016, p. 388, p. 417; Becker & Hecken, 2011, p. 400). Inequality might also increase in non-vocational continuing education in the next few years, as economic slumps (e.g. as a result of the pandemic) hit worse-off strata of the population harder and deprive them of funds to participate in continuing education, reducing their lifelong educational aspirations (Käpplinger, 2020, p. 161). Intrinsic divisions in the education system are thus propagating themselves, and a hierarchy of formal educational degrees is functioning as 'usher' (Levy, 2018), even into careers in continuing education. Thus, as Martin Baethge noted as early as the 1990s (1992, p. 317), professional and social mobility encounters significant new structural obstacles, despite the expansion of continuing education. These obstacles become part of social reality as those interested in continuing education accept the place in the supply structure they are 'entitled' to on the basis of their educational capital.

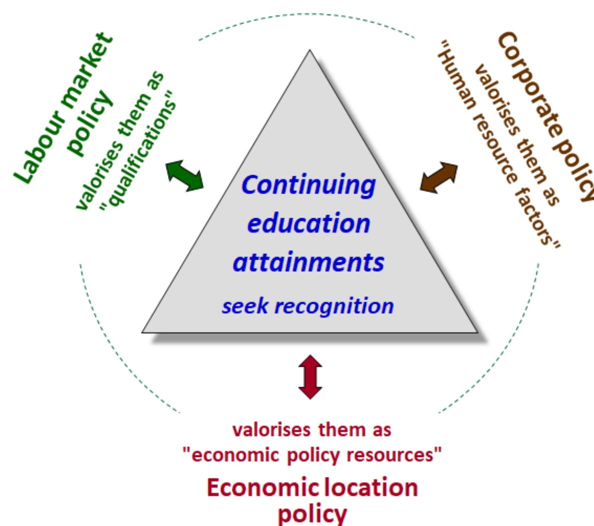
Market logic determines how continuing education is valorised

Market logic influences not only the development and implementation of continuing education programmes but also how the degrees and certificates they generate are valorised. Completion certificates, for example, require the recognition of labour markets and the support of important market players (regulators and clients) for valorisation. With such support, as the industry studies of Schüepp and Sgier (2019) show, even non-formal certificates can achieve industry-wide recognition. On the one hand, this may increase the chances of holders of these certificates. On the other hand, it can mean that continuing education without market-based support will receive no recognition and not be considered a basis for advancement, meaning that the corresponding educational efforts turn out to be a dead end. Implicit expectations of profitability and, frequently, stereotypes having nothing to do with education determine the (market) value of educational attainments. Such stereotypes also influence what learners expect from their educational careers and labour market opportunities.

In addition, the necessity for market recognition and valorisation carries the risk that the continuing education system and its attainments will be instrumentalised for non-educational goals. Education claims an independent standpoint beyond all attributions of function and efficiency requirements. Its task is emancipatory: to strengthen individual resources in order to shape individuals' lives (Biesta 2020, p.

1024). However, external attributions of function cannot be completely excluded. This applies to professionally oriented continuing education in particular: continuing education must seek recognition from political and market players, and it is regularly included in these players' discourses and strategies (Schöni, 2017, p. 149). As seen in the Swiss labour market, corporate and economic location policy over the last few decades, players valorise continuing education attainments for their own ends (Fig. 1).

Figure 1. Market players and policies determine the rules for valorising continuing education (author's own figure)



a) *Labour market policy* valorises continuing education qualifications as labour market resources. It accords specific types of economic potential to certificate holders and channels them into different market segments; in the process of attribution, it resorts to stereotypes of educational level, gender or nationality. In the debates on 'skills shortage' that flare up periodically in the Swiss labour market, it is clear how little continuing education influences categorisation and valorisation of the attainments it supplies.

b) *Corporate human resources policy* valorises continuing education qualifications as human resource factors. In recruitment, firms target 'high-potential' staff and staff with mere 'operative' potential and deploy them differently in the operational work organisation. On this basis, and without having to legitimise the practice even rudimentarily in terms of education policy, they give employees only selective access to continuing education and personnel development or deny it altogether to less-qualified groups.

c) *Economic location policy* valorises continuing education qualifications as economic policy resources. It invokes indicators which have been selected arbitrarily by international rating agencies (e.g. rates of participation in continuing education, proportion of academics). From these, it derives requirements which reflect the location policy standpoint, for example, making selective investments in certain levels of education to improve international ranking. The 'educational indicators' and ranking policy pursue goals of their own.

The continuing education sector may have little influence on these forms of valorisation, but it is still the deliverer of symbolic capital and the addressee of political demands. The continuing education business is not uninvolved in this, however. It abets the various forms of valorisation described by classifying its offering according to customer needs and by directly addressing (for example) companies' personnel policy requirement categories. In this way, it will offer a management course that enables participants to undertake leadership tasks in a highly profitable business area, or a course for healthcare assistants in intensive but badly paid care work. With this, the continuing education business also speaks to learners who orient themselves by such structures and accept the associated hierarchy of values.

The upshot is that customer-oriented marketing brings recognition to continuing education but subjects it to discourses and serves valorisation goals over which it has no say. This has paradoxical effects. For example, a continually rarefied course offering produces new types of qualification that set off conflicts of competition in the education system, or which may be neutralised at the valorisation stage (Weber, 2013).

Results of the analysis

An analysis of market-oriented continuing education produces ambiguous results. With its offering, the sector facilitates the acquisition of a large range of qualifications. It stimulates learning processes and promises professional competence and economic competitiveness. However, it sets its priorities as marketing, turnover and the consumption of its products. It takes little interest in the long-term outcomes of learning or the impact of its business on social structures. In terms of education policy, it demonstrates no clear profile of its own: its entire development is the result of the heterogeneous profiling and sales strategies of the players dominating market segments. The coordinated efforts of adult education associations cannot do much to change this. Continuing education realises its traditional objectives of offering 'second chances' at education, creating educational progression options and correcting social class inequities only in some areas at best. This seems to do it no harm, however, for in the neoliberal economic order, education legitimises itself more by motivating individuals to perform on their own responsibility and less by empirical verification of its own systematic effects and benefits.

An alternative approach: continuing education as value creation

The aim is to measure continuing education and its achievements according to social value creation potential rather than market performance *(see research question 2)*. To achieve this, theoretical approaches and criteria are required that are not derived from the doctrine of economic liberalism and its market models. Indicators such as sales, market share and marketing efficiency lose centre stage in the evaluation of value creation potential. This does not mean that economic performance will be neglected. What is needed first, however, are guiding principles regarding the social benefits of continuing education and a value creation concept that, in addition to the monetary values generated by programmes, takes into account non-monetary values, i.e. value contributions for learners and society (Timmermann, 2013).

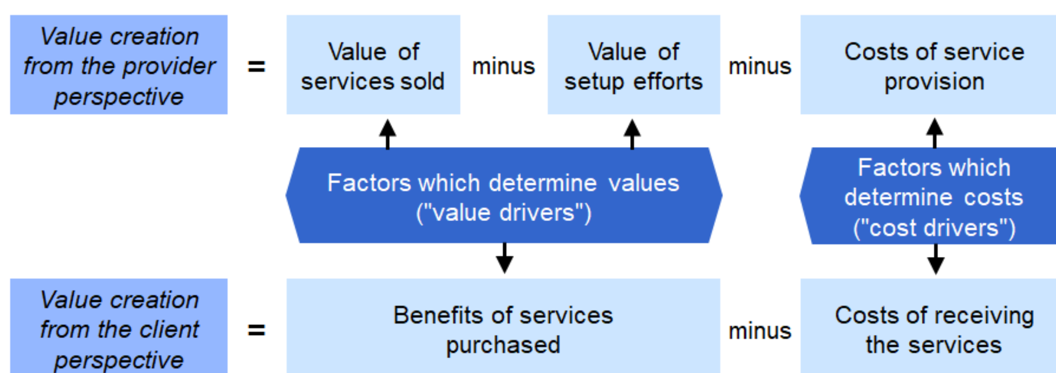
In developing an alternative approach, conceptual help is found in the economic value creation theory. The latter asks how economic activities, such as personal services, create value for providers and clients. An education sociology perspective is

important in understanding the social determinants of value creation in the education sector. It steers attention away from business and towards the reference systems of education and asks how educational values find recognition, how they are distributed socially and what positional claims arise from them. The legitimisation of education is the subject of discourse analysis approaches that reconstruct how educational attainments are construed and identify the dimensions – e.g. market-related, performance-related, opportunity-related – via which the pertinent discourses are organised.

Economic value creation model

In the following, we focus on *economic value creation theory*, while also including educational sociology and discourse analysis aspects. What can economic value creation theory contribute to the understanding of value creation in education? In the general economic model (Fig. 2), total value creation from services equals (a) the value of services sold minus the value of setup efforts and costs of service provision and (b) the benefit to clients minus the costs of receiving the services. According to the assumptions of the economic model, value creation is always regarded from the perspective of both provider *and* client (Stauss & Bruhn, 2007, p. 9). The client cooperates in service provision, and the cost–benefit ratio must therefore work for both parties.

Figure 2. Economic value creation model in the service sector (based on Stauss & Bruhn, 2007)

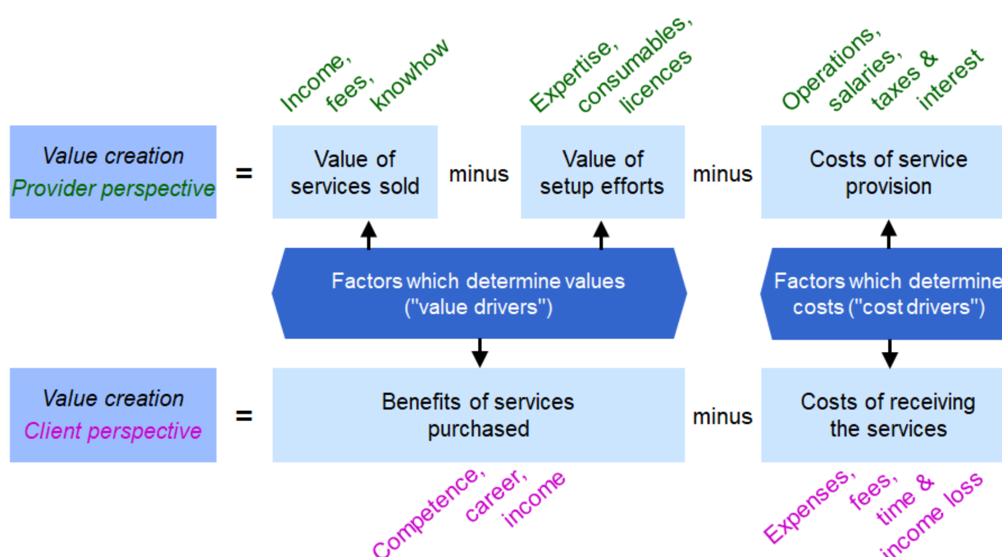


The model's assumptions apply to personal services in general, i.e. (for example) to healthcare, legal or catering services as well as education services. It should be noted that client benefits from services are extremely fuzzy and that marketing exploits this fact for its own ends: services that are not foreseeable for the client in advance or whose details are not measurable or comparable can be 'trued up' when advertised. For example, tailor-made benefits may be promised, which makes the individual cost–benefit ratio look more favourable to clients.

Value creation in education

The value creation model does the same when applied to the education business. In a particular setting, providers supply learning services in collaboration with the participants (Fig. 3). For the provider, total value creation results from the value of services rendered (income, fees, etc.) minus the value of setup efforts (expertise, licences, consumables, etc.) and the costs of service provision. For participants/clients, value creation results from the benefits of services purchased (competences, outcomes) minus the costs of receiving the service (expenses, fees, any associated loss of time and income). Cost and benefit aspects are therefore transposable to the education business, for even here, the following applies: values are only generated if both parties see benefits and consider costs supportable. This is particularly true for education services because every learning progress step depends on the individual efforts of learners.

Figure 3. Model of value creation in the education sector (based on Schöni, 2017, p. 109)

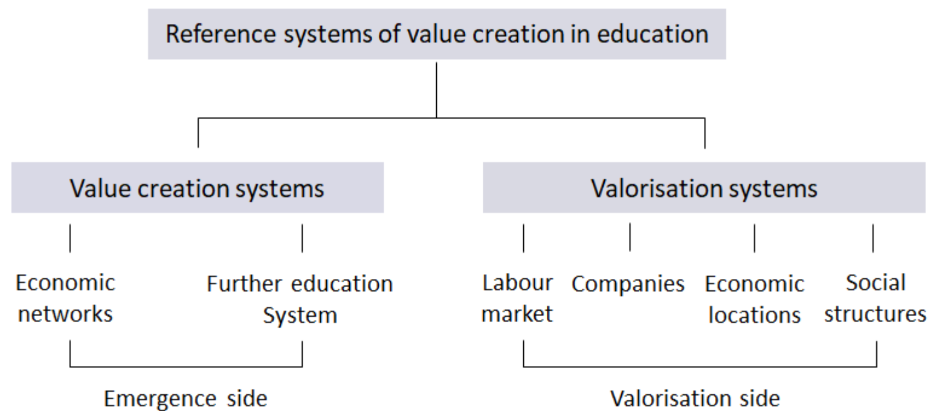


However, applying the model to education has its limitations. Benefits such as competences and certificates cannot readily be interpreted in *monetary* terms, nor can outcomes, which only become visible over time. This limitation also applies to non-material outcomes in other service sectors. From the educational sociology standpoint, however, it is important to note that the economic model is not fully capable of describing the value creation of education because it is focused on the business relationship. Education is more than business. It is necessarily founded on consensus and social interaction and is entwined in social contexts and discourse, as follows:

1. The starting point for all value creation in education is *consensual agreement* regarding targeted educational values, based on the teaching and learning relationship, learning settings and application cases, as described in the course announcement; the distribution of burdens and benefits must correspond to social norms, e.g. the principle of equivalence.
2. Value creation in education is realised via *social interactions* that are structured in curricula, social forms of learning and implementation steps and continue in

learners' fields of practice. As educational values, favourably viewed competences, certificates, progress options and outcomes are developed and realised.
3. Educational values require recognition in the societal *reference systems* of emergence and valorisation (Fig. 4). Accordingly, they must slot into a hierarchical classification system as qualifying aspects, they must be in demand in economic networks, and they must be classed as a resource that can be valorised in the labour market, in business and in social relationships.

Figure 4. Reference systems of the emergence and valorisation of educational value (author's own figure)



Reference systems are significant because they safeguard educational values and make additional value contributions. For example, they can augment the worth of qualifications by broadening their recognition, or they may lower it by declining to recognise them. Valuations are nourished by various sources, ranging from actual, measurable economic usability, e.g. in the labour market, to social practices, discourses and ascriptions that rely on stereotypes. The dependence of continuing education on value-enhancing recognition of its products harbours – as shown in the previous section – the risk of discursive appropriation, for example, where educational values are deployed as instruments of non-educational strategy (see also Lassnigg, 2015).

These considerations lead us to the *definition of education value creation*. The concept addresses both the process and the product of value creation. On the one hand, it identifies the interactive development or creation of educational values and their recognition in the relevant reference systems; on the other hand, it indicates the valorisable result of these processes, i.e. the whole of the values created in education programmes and learning environments, including the value contributions generated in the respective reference systems.

In this way, we gain access to an alternative orientation framework and conceptual foundations that allow us to analyse continuing education accomplishments in terms of value. This approach takes into account the continuing education's current market environment without uncritically adopting its valuation criteria, such as market performance. Value creation here means that learning progress ensues in appropriate settings and is recognised and valorised in reference contexts. According to this conception, marketing and sales success are merely enablers of value creation and not meaningful value creation indicators. They create conditions for contractually regulated, cooperative development of educational values, but generate no values themselves.

They reference values (outcomes) that may or may not be realised, and such realisation is rarely verified under the primacy of market freedom and freedom of contract.

The proposal to apply the value creation approach to the field of continuing education is not without its risks. It may conceptually advance the already strong dynamic of 'economisation' in educational activities. And political economy approaches tend to trigger the existing defensive reflexes of the continuing education sector. However, the influence of the neoliberal turn on education should be a cue for continuing education research to address economic concepts so as to demonstrate the particular productivity of education and, in so doing, to develop arguments against destructive economisation (Käpplinger, 2019, p. 5).

Analysing the value creation of continuing education

How is the value creation potential of continuing education determined? According to the concept, the value creation of a programme comprises (1) *values* (certificates, competences, progression options, outcomes) interactively developed and realised by learners and teachers in a contractually regulated, socially standardised setting and (2) *value contributions* generated by the recognition and valorisation of educational attainments in educational, economic and social reference systems. Values and value contributions together form the overall potential of a programme.

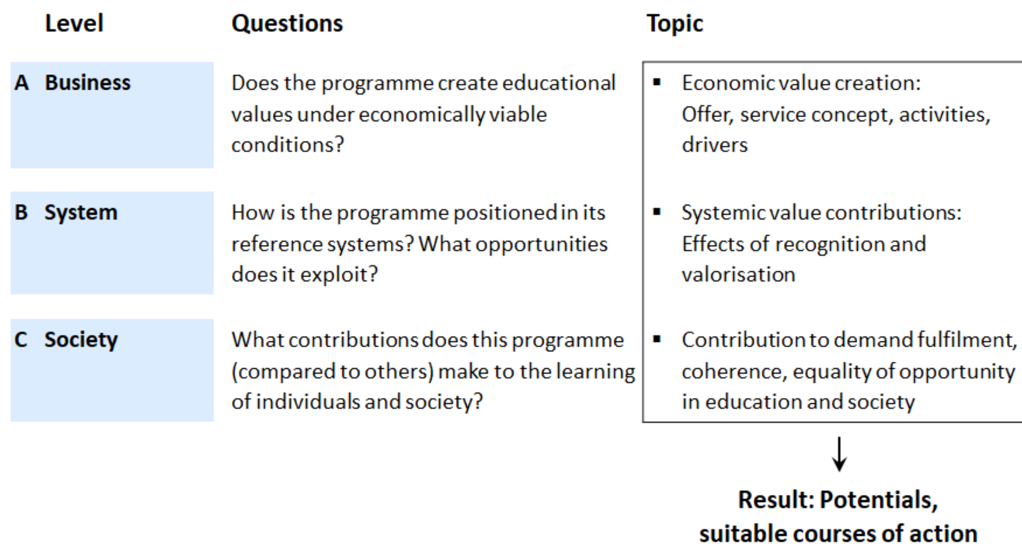
To identify the value creation potential of a concrete continuing education programme, we may conduct a *value creation analysis*. This analysis provides information on the programme's service concept, its positioning in the relevant environment and the values and value contributions that actually emerge from it. It generates differentiated, systematically based statements about the programme's potential.

Before the steps in this analysis are described, an *example* illustrates the findings that the analysis can supply. The context is a modular continuing education programme for professionals in the cabinet–making and furniture industries investigated by Schüepp and Sgier in a study of the sector (2019, p. 19). The sponsor is the trade association; its member companies recognise the programme certificate. The educational concept is built on the original vocational training foundation and aims to instil competence in assembly, which is in demand in the sector, and provides an associated qualification; thus, it responds to a gap in the qualification system. The certificate is accorded solid value in the sector. In the higher vocational education and training system, it is not recognised, however, and thus no value is added within this reference system. Lifelong learning is seen butting up against system boundaries. Apart from that, the programme's potential can be regarded as intact because of the demand for and recognition of it in the sector.

Analytical steps

A value creation analysis is suitable for programmes run by any private, corporate or state provider. Prompts for conducting an analysis might be a current programme evaluation, requests from interest groups or educational policy debates. The analysis investigates 'potentials', i.e. the ability of a programme to generate value(s) in its respective environment. The analysis does so at three levels (Fig. 5):

Figure 5. Analysis of the value creation potential of educational programmes on three levels (author's own figure)



a) Business level: According to what business concept and contractual basis, and in what interactive settings, does the programme provide its services? What client and provider values are created, and what costs are incurred? Are these accepted by both sides? How is the offer positioned in the sector and the markets, and among competitors?

b) System level: How is the programme positioned in the pertinent education and qualification systems, and in the networks and value creation processes of the economy? Are the qualifications it produces recognised in the labour market, in companies and in social relationship structures? What players determine the rules of valorisation, and in what discourses are the rules justified? What systemic potential results?

c) Societal level: Compared to similar programmes, what contributions does the programme make to continuous, structured learning in the education and occupation sectors, equalisation of educational opportunity, alignment of educational paths and the addressing of economic and social change? How are the programme's contributions positioned in the dominant discourses on education and economic policy, and how are they rated?

The analytical steps roughly outlined above essentially follow the economic analysis of value creation configurations (e.g. Woratschek et al., 2007) but broaden its view to include the reference systems of education and the value they contribute. The analysis provides information on how educational services are supplied and how educational values are created, recognised and valorised. The question on economic values is followed by a question about systemic and discursive value contributions and any opposing value-destructive constellations. We may call all of this *enhanced value creation analysis*. Detailed guidelines for the analysis have been developed (Schöni, 2017, p. 165) and comprise nine methodological steps.

The potentials identified in the value creation analysis are compared. What are their relative weights? What are their contributions to overall value creation? According to

our conceptual assumptions, the better the contributions are aligned and the more widely the educational values they engender are recognised, the greater will be the coherence and thus the overall value creation potential of the programme across the three analytically different levels.

The criterion of *coherence* is significant for learning and for education value creation: only by means of continuous learning steps and education paths capable of progression can experience be accumulated and skills be integrated, whether by the individual learner, in organisational contexts or in social learning processes. Coherence is a guiding principle that must always be aspired to because the structures and framework conditions of education are everchanging.

An overview involves the entire continuing education *segment* to which the programme belongs. How does the value creation potential of one programme compare to that of similar programmes? Are the intended educational values complemented and/or enhanced by other programmes and education paths, or are they challenged or even neutralised by them? What synergies can be accessed by coordinating programme offer, common recognition standards and horizontal or vertical value creation networks? The answers to these questions have consequences for supply policy in the segment, for example, inspiring better alignment of education paths and qualifications or adjustment of qualification regulations.

Value creation analysis of two selected programmes

The concept and methodology of value creation analysis underpin the alternative approach to evaluating the dynamics of the continuing education sector. This approach must now prove its relevance to and suitability for continuing education in practice. In the following, the procedure and findings of the value creation analysis are illustrated using the examples of two programmes familiar to the author through his own consulting practice:

1. ‘Development of management staff’ programme for public administration personnel
2. ‘German in the work team’ programme for migrants

The above comprise two non-formal, profession-oriented continuing education programme ‘cases’. They provide empirical evidence that the value creation analysis approach is in fact applicable in the education context *(see research question 2)*. However, they are not part of an empirical examination of hypotheses using standardised data. Both cases involve small, specialised providers (with ca. 15 employees) who are able to align their training courses with operational requirements and processes. For the analysis in both cases, project teams comprising area managers, trainers and clients were brought together and schooled in the method by the author. Their working steps followed the guidelines. Procedures and findings were critically reflected upon and documented.

The case presentation shows the steps in the analysis, which cover not only business relationships but also structural characteristics of the environment, players’ perspectives and discursive assessments. In this way, the strengths and weaknesses of the programme and its service concept can be identified, value creation potentials compared, and possible courses of action in programme policy determined. The analysis produced quite different results, as shown in the following.

'Development of management staff' programme for public administration personnel

On behalf of regional public administration bodies, a provider specialising in management training courses organises multi-day programmes for junior staff (for comprehensive details, see Schöni, 2017, p. 172). According to its announcement, the above programme offers management staff who are seen as having the potential the opportunity to sound out their chances and perspectives with regard to a higher management career. Trainers are familiar with the management culture and succession planning of public administration. Participation in the programme does not guarantee promotion but is intended to identify higher management talent. After repeating the programme for several individual administrative units, the provider decided to conduct an in-depth analysis of the value creation potential. The project group estimated the potential of the programme at all levels.

A Business potential: The programme creates values for *clients:* participants clarify their development chances, and administrative bodies identify internal management talent. Costs and time expenditures are supportable from the clients' point of view. *Provider-related* values include stable income prospects and efficient cost steering thanks to well-rehearsed provider–client cooperation. The monopoly position of the programme in the local market segment of public administration and the cost–benefit ratio accepted by both sides make for solid economic potential in a limited-volume buyers' market.

B System potential: As an 'external personnel developer', the provider is vertically integrated into the *value creation and valorisation system* of the administration. The provider supports the personnel processes of individual administrative bodies and strengthens local management cultures. However, the programme is not anchored (horizontally) in the *management training system* of the public sector: there is almost no cooperation with institutions of vocational education and training or university continuing education, meaning that the certificate is not widely recognised and progression options are lacking. System-related opportunities are thus exploited only partially, and the potential is therefore restricted.

C Societal potential: The administrative bodies select participants themselves and steer access to management positions. The programme management accepts this, the result being that a culture imbued with patriarchal norms of behaviour is perpetuated. Women and migrants remain underrepresented in the management development programme and thus in public administration management positions, a fact that reduces the programme's impact. Current civic issues, such as citizens' rights, gender equality, data privacy and climate change, are only hesitantly taken up and addressed in the programme. Learning for the future requirements that public administration will face is given too little priority.

Results: (1) The value creation potential on the business side is regarded as intact at the time of the analysis. An important driver of value is its close link with the value creation processes of public administration. (2) The system potential shows deficits: good vertical integration into public administration processes contrasts with a lack of horizontal integration into management training in the public sector. (3) The programme's patriarchal selection procedure and selective thematic orientation seem not to be critically addressed in public administration narratives. This restricts the programme's societal value contribution.

If value creation analysis had been limited to the current business relationship and market performance, the programme's overall potential would have been *overestimated*.

Only the three-level analysis includes the education-specific deficits: the facts that the programme seeks no connection with the continuing education system; that programme management fails to apply professional standards in programme admission; and that institutional clients are determined to reflect the established public administration culture in the design of programme content. Such deficits would have remained hidden if they had been viewed from a mere market perspective. However, it is entirely possible that they will negatively impact business prospects and reduce overall potential.

Discussion of courses of action required: The project team members agree that an investigation should be conducted into how far better integration into the continuing education system would help to extend the programme's client base and market and stabilise its value creation. Having a wider foothold would also spur professionalisation of the selection procedure and extend the circle of potential management talent beyond the sphere of *regional* public administration. This is not enough, however. A fundamental reflection on self-image and the patriarchal patterns of public administration culture would also help to make the programme receptive to civic concerns and future community issues. This would undoubtedly present advantages for potential clients.

Care would have to be taken here to ensure that the already existing advantages of vertical integration into public administration would remain in place. Even a programme with broad institutional recognition creates client value only if it remains closely connected with client processes and the provider takes responsibility for quality.

'German in the work team' programme for migrants

A non-profit course provider conducts language courses for foreign-language employees of firms in the building and cleaning businesses (for comprehensive details, see Schöni, 2017, p. 224). The programme originated from a training initiative for migrants and was soon in demand. Programme participants learn how to make themselves better understood in their teams and among clients, circumventing difficulties in the order process. Before starting the programme in a new company, the company's language requirements are investigated and suitable courses are developed, which address topics of operational working practice and learning needs. A foundation sponsors the programme. It finances the prior clarification study and the development of particularly elaborate training concepts, and it covers any deficits.

Recently, the programme manager has observed that companies invest less in the basic skills of their employees. Competing providers complain that the funding available from the foundation distorts market prices. The foundation called for information on costs and potential. A project team was tasked with conducting a value creation analysis on the three levels, which produced differentiated results.

A Business potential: On the *client side,* the programme successfully strengthens employees' individual language proficiency inside and outside the company. Client companies receive customised training courses at moderate prices. For the *provider*, the service generates stable client relationships and continually increases know-how in the organisation of company training programmes. However, demand fluctuates, and the courses are not self-supporting economically: the prior clarification study and the development of the course are partly funded by a foundation.

B System potential: Vertically, the training concept is aligned with the commercial value creation chain of clients and is well integrated. Horizontally, the course is anchored in the 'German as a foreign language' continuing education segment, where it

finds advantages, such as common standards of an european framework of reference for languages and access to public funding. In this segment, however, there is much provider competition. The programme is not recognised in formal vocational education and training.

C Societal potential: Programmes for persons at risk in the labour market contribute to social integration. They increase the work qualifications of these persons as employees and reduce social costs by fostering learning and problem-solving in the workplace. These (indirect) effects are obvious in many individual cases but have not been sufficiently verified by empirical data. Migration policy debates also periodically question the impact potential and economy of these programmes.

Results: (1) Business potential is currently not intact. The value drivers 'company-specific clarification and course concept development', which speeded up the market launch, now threaten to become (negative) cost drivers, which may sink the business if foundation funding is withdrawn in the future. (2) The system potential is not fully exploited. Resources from the continuing education language-teaching segment are utilised, but recognition in vocational education and training is lacking (the latter problem is systemic and not addressable within the continuing education segment, however). (3) The societal value contribution is evident, but not quantitatively verified, and it is disputed politically. This fact indicates the existing tensions between the interpretive models of migration and economic policy.

A narrow view focused on business relationships and economic performance would also be insufficient for this programme; it would clearly *underestimate* its overall potential. The market environment rates the lack of commercial viability of the programme very negatively, reducing its sales potential. Only the enhanced value creation analysis reveals the system-related and societal potentials of the programme. If the provider made the interplay of integration, social and labour market policy visible in its programme marketing, it might succeed in achieving broader recognition despite criticisms of commercial 'unviability'.

Discussion of courses of action required: From the perspective of those involved in the programme, the most urgent course of action would be to re-establish the economic acceptance and viability of the programme. The benefits of the company-specific prior clarification study and programme concept development should be better communicated. These advance efforts should be rendered visible in the price calculation and should also be offered separately (at a cost). They should be presented as an added value for which companies are ready to pay because they are not available elsewhere.

However, critical reflection indicates that economic success in the market is absolutely not the only way the value creation potential of this programme can be realised. The societal value of the language proficiency of migrants is not decided in the continuing education market, but in debates on migration and integration policy. Convincing facts regarding efficacy, and thorough communication, are required to boost the programme. The programme provider therefore intends to (1) cooperate more closely with other non-profit providers so as to lend more public weight to the objectives of language integration and (2) commission a study that supplies empirical evidence of the economic and societal value contribution of language integration measures and underpins the arguments deployed in the relevant political debates.

Discussion: Key issues of a reorientation that goes beyond market logic

The starting point of this article was the observation that the adult or continuing education sector is thoroughly oriented towards market success. The author's deliberations on *research question 1* show how a market orientation shapes continuing education practice – from programme development, marketing and distribution to innovation behaviour in the sector. Programme ranges are partially arbitrary, and educational attainments may turn out to be unstable and education paths incoherent. The commercial segmentation of programme offerings influences opportunities to access continuing education. Even the way continuing education attainments – final qualifications, certificates – are valorised in the economy and society is determined by market logic, as shown by a glance at the Swiss continuing education sector.

While providers of continuing education focus on the marketing of products and certificates, they often have little certain information about the longer-term outcomes of learning. Indeed, in their narratives and marketing messages, the continuing education sector decisively declares itself to be in the service of lifelong learning, with its programmes promising career opportunities, competitiveness, improved labour market structures and solutions to social problems. So far, however, no adequate, thematically broad and continuously applied measuring infrastructure exists that might systematically examine such effects. Nor does the Swiss continuing education sector itself display a resolute interest in the empirical and reliable compilation of learning outcome data at the level of individuals and structures.

From a discourse analysis perspective, it is remarkable that neither the marketing focus nor insufficient data regarding outcomes seem to diminish the power of the continuing education narrative. The positive thing about this is that participation in continuing education – at least on statistical average – remains stable at a high level and that the target groups of continuing education continue to be aware of their learning needs. The participation rate among 25- to 74-year-olds between 2010 and 2019 remained stable at 25–27 percent and only sank to 22 percent at the beginning of the pandemic (Federal Statistical Office, 2021). Negative, however, are the consequences of a market orientation for the development path of the sector. The designation of continuing education programmes and regimes as economically relevant has less to do with empirically verified benefits than with how they are positioned in markets and discourses. This positioning depends on what marketing instruments and channels providers master; how much recognition and legitimation they can mobilise thereby; and how far they are able to convince adults to pursue continuing education and work towards individual career goals. It is this stabilising of the *motivation to achieve* that places continuing education thematically at the core of liberal economic discourse, which is not concerned with enabling self-determined participation in social learning and change processes. Market-oriented continuing education does not necessarily pursue the goal of strengthening the professional capacities of individuals in the long term so that they remain capable of acting independently of the employer and even in times of crisis. This may be because neither the sector nor continuing education policy has clear visions of qualification development or, more precisely, that it leaves the latter to 'the market'.

What are the drivers that provide impetus for market orientation in the sector and cause continuing education to be increasingly organised according to market principles? In this context, the concept of 'marketisation' (see Käpplinger, 2019; Košmerl & Mikulec, 2021) identifies *preconditions*, on three levels, which are present in many

countries in a specific form: first, political concepts and discourses that tie continuing education activities to markets and denigrate state activities; second, steering instruments such as product marketing, output steering and controlling whose performance objectives put educational measures under competitive pressure; and third, funding mechanisms that deprive education of financial stability or make it conditional upon more onerous accountability. As illustrated, these general conditions also apply in the Swiss continuing education sector.

Developing the approach of education value creation *(research question 2)* offers an opportunity to question the market-oriented self-conception of continuing education and measure its performance via alternative means. The approach broadens the valuation horizon and categorises the value-creating achievements of continuing education. Its foundation is a value creation concept that makes it possible to gather information on the productive potential of learning at several levels. Value creation analysis enhanced in this way does not neglect the *business level*, e.g. the demand volume and the economic viability of programmes. However, it relativises the dominance of a view fixed on sales and customer relationships.

Value creation analysis at the *system level* focuses on entities that are relevant for the recognition and valorisation of educational attainments. It brings a 'suprabusiness' perspective into play. However, this perspective cannot guarantee that continuing education's value creation potential will only be judged according to standards capable of generalisation. For on the one hand, systemic recognition is, as shown, organised through discourses and particular valorisation strategies such as those of the labour market or economic location policy; and on the other hand, in striving towards coherence, an educational subsystem will frequently set itself against competing systems in order to push through its own standards and safeguard market share. The possible consequence is that the educational values created by one subsystem, e.g. completion certificates and progression options, may be neutralised by the competitive actions of other systems. These frictions may show up within the market segment, as seen in the case of the 'Development of management staff' programme, whose certificates are not recognised in public sector management training and are not likely to survive in the long term. Frictions also build up in the competition between subsystems of vocational education and training, for example, between higher vocational education and university continuing education; this is observed periodically in Switzerland.

For these reasons, it is important not to confine value creation analysis to the logic peculiar to one subsystem, but also to take into account competing systems and programmes. This superordinate lens is what directs the analysis to value contributions at the *societal level*. That analysis evaluates what a particular portfolio of providers and programmes – e.g. those targeting migrants who speak foreign languages – contributes to overall progressive learning, social integration and problem-solving. Programmes are thus not treated in isolation but always in connection with other programmes in the segment and at the level of qualification. The better the players in the segment and beyond collaborate and the better the objectives and paths are anchored in the education system, the greater (it is assumed) the overall potential for value creation in the programme segment will be.

Conclusion

Ideally, what would be derived from the findings of this article is a continuing education practice that is not determined by sales strategies alone but by the endeavour to facilitate value creation in learning via aligned education offerings and education paths; and to

safeguard educational values within the relevant reference systems. This presupposes an advanced level of knowledge and research capacity, e.g. research into qualifications that explores occupational requirement trends, identifies target group learning needs and measures educational effects in terms of fulfilling learning needs. Research is also needed on continuing education subsystems and on learning paths that do not end at the boundaries of subsystems (Weber, 2009, p. 75).

In conceiving, implementing and reviewing the latter paths and in improving connectivity in the education system, both continuing education research and adult education associations have important roles to play. The complexity of the task lies in reining in the commercialisation of learning and strengthening coordinative functions while simultaneously cultivating spaces where competition over better learning concepts and sustainable learning outcomes can play out. At the level of education policy, efforts are required to dismantle the mechanisms that have up to now underpinned a socially selective and instability-conducive education regime.

The value creation approach and methodology of value creation analysis may provide an impulse for a reorientation in the further education sector, which has so far been driven by the tenets of market logic. The approach helps to evaluate alternative ways of creating educational values and assess their place in the reference systems. Naturally, the approach needs further development in research and investigation in practice.

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Participation of older people in learning studies: A scoping review

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Abstract

The participation and meaningful engagement of older people are strongly supported because of their individual and communal benefits. Currently there is a lack of general understanding of how older people participate in research activities. The purpose of this review was to examine the ways older people participate in learning studies. A search of abstracts of empirical studies published in English was conducted in three databases between 2015 and 2019 using scoping review methodology. The results showed that most often older people did participate as study subjects in clinical studies. Other participant roles included informants, partners, and multiple roles. The review addressed a paucity in qualitative and participatory roles in older people's learning studies. All participant roles are still needed to provide various standpoints for learning studies. Further studies are suggested to provide various meaningful and participatory ways for older people to get involved in research activities.

Keywords: older people, learning, participation, scoping review

Introduction

Worldwide, the number of older people is growing faster than any other age group. Referring to older people, we use a definition and procedures by Fudge (2007, p. 493):

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'"Older people" were defined as those over 65 years of age, unless authors defined older people according to different age bands. Where authors did not specify an age, author-defined terms such as 'older people' were used'. The population ageing phenomenon is one of the most significant social transformations of the 21st century and has implications for many sectors of society. In response, the United Nations (2015) have highlighted the increased participation of older people in social decision-making processes and have called on governments to develop more innovative policies and public services targeted towards older people. Additionally, they are at the centre of a new action plan on ageing and health, the United Nations (UN) Decade of Healthy Ageing 2021–2030, which calls for 'meaningful engagement and empowerment of older people.'

Researchers, policymakers, and service-providers have pointed to the significance of conducting the knowledge on ageing from the perspective of older people. Rather than consulting younger experts, knowledge production through collaboration helps societies to adapt research, geriatric services, and products to suit older people. (Chen et al., 2020.) In fact, cross-disciplinary research encouraging greater community participation and empowerment within decision-making has increased in recent decades (Beebeejaum et al., 2015). Recently, community members have been engaged to collect data and campaign on behalf of initiatives meeting the needs of communities (Tuckett et al., 2022). This is in line with the World Health Organization (WHO, 2020) that has identified a lack of qualitative data and data that relates to participatory processes of older people and further emphasised the importance of data in understanding healthy ageing.

WHO (2020, p. xi) defines healthy ageing as 'the process of developing and maintaining the functional ability that enables wellbeing in older age'. The goal of the Decade is to optimize older people's functional ability that includes one's ability to learn, grow and make decisions. Other functional abilities include: a) ability to meet one's basic needs; b) mobility; c) ability to build and maintain relationships; and d) ability to contribute. Functional ability combines the intrinsic capacity of the individual, the environment a person lives in and how people interact with their environment.

Even though their participation is strongly suggested, currently there is a lack of general understanding of older people's participation in research activities. This study aims to fill in the gap by reviewing how older people have participated in studies concerning older adults' learning. Our focus on learning studies reflects the emphasis on the WHO (Sibai & Hachem, 2021) and current studies (e.g., Chae & Kang, 2018) of the significance of lifelong learning in active ageing. Fast changes in current societies, especially digitalisation of public services and free time activities, highlight the importance of learning of all people. In this study we used the term 'learning studies' to refer to studies concerning older adults' learning. The understanding of learning varied in the reviewed studies. The goal of this review study was to achieve an overview of the topic and, therefore, we used the general term of 'learning' to cover the variety of the studies and to be able to answer the research question.

Accordingly, this research aims to 1) exhibit an overall picture of roles that older people have had in learning studies to present the focus of current research, and 2) disclose the learning studies that use participatory methods with older people. Reviewed studies are classified based on the roles of older people as subjects, informants, or partners in research activities. This classification reflects various forms of social participation of older people in research that supports further research by providing concepts for describing the ways how older people socially participate in research. Simultaneously, research reveals the possible paradigmatic change in research methodologies by disclosing the learning studies that employed participatory methods. Results can be used to deepen understanding of different roles of older people as research participants as well

as developing innovative models for involvement of older people in research that is in line with the recommendations of WHO (2020).

Older people's participation in society

Levasseur et al. (2010, p. 2146) define social participation as 'a person's involvement in activities that provide interaction with others in society or the community.' Conceptually, social participation has been presented as *activities* (Aroogh & Shahboulaghi, 2020) in areas such as civil, sports, cultural, productive, social, and entertaining activities or *memberships* in clubs, organizations, or societies (Kouvonen et al., 2012). Researchers have hinted that older people may differ in their social participation from their younger counterparts, as they spend less time in structured activities as employees (Levasseur et al. 2010). Referring to older adults, Aroogh and Shahboulaghi (2020) emphasise community-based activities and interpersonal interaction, active participation, and individual satisfaction. In turn, community participation refers to 'active involvement in social, complex and nondomestic activities that occur outside of home' (Chang et al., 2013, p. 772).

Social participation has many mental and physical benefits for older people. Consequently, it may prevent dementia (Kouvonen et al., 2012) and ease loneliness (Niedzwiedz et al., 2016). Social participation has been regarded as a key component of successful ageing (Levasseur et al. 2010). Ageing brings changes in older people's social circles, which heightens the risk for negative outcomes associated with social isolation and loneliness (Dawson-Townsend, 2019). Those social connections may be smaller in number due to deaths of family members and friends, geographical distance, or interactions may be diminished due to changes in health (Black et al., 2012). In general, staying home may bring less opportunities for social interactions.

In social gerontology, the study of the social world of older people has been on the move from the medical setting to the community setting (Weil et al., 2017). In research, community can mean either an individual's local neighbourhood or broader world as 'a community' (Merriam & Kee, 2014). Merriam and Kee (2014) suggest that promoting lifelong learning in a community of older people also enhances community wellbeing. For example, older people can actively contribute to community wellbeing through volunteering, caregiving, civic engagement, and intergenerational activities (Merriam & Kee, 2014) such as participation in research activities (Buffel, 2018).

Involvement in research activities provides one way for social participation (Llorente, Revuelta, & Carrió, 2021) and learning for older people. Research involvement may enhance existing competences and learning of new skills (Buffel, 2018). Simultaneously, the chance to describe one's own understanding may increase metacognition and self-awareness, which may enhance learning (Krätzig & Arbuthnott, 2009). Lifelong learning via participating in research can, therefore, support meaningful engagement and empowerment of older people that follows the UN Decade of Healthy Ageing 2021-2030 aspirations.

However, the participation of older people – whether socially, in further education or in civic engagement – can always be appropriated by the welfare state. Critical consideration should be employed to understand the economic and political motives that can be used in recommending older people to civic engagement (Martinson & Minkler, 2006). Also, some older people refuse civic engagement because they do not want and cannot do it (Martinson & Minkler, 2006). Participation of all, including older people, needs to be based on informed consent and their possibility to withdraw their participation whenever during the research process (Byrne, 2016).

Participation roles of older people in learning research

Adult education, including older people's education (The Council of the European Union, 2011), has a wide spectrum of practice and research (e.g., Grummell & Finnegan, 2020) that is reflected in the ways how various learners participate in research activities. The fundamental diversification of research paradigms occurred when qualitative inquiry developed separately from an already established tradition of quantitative method (Hammersley, 2013), shifting from empirical-analytical paradigm to interpretive or critical paradigm in participation research in adult education (Bagnall, 1989; Jennings, 2015). This gradual shift or diversification in the research paradigms is also reflected in the roles where learners participate in learning studies.

Traditionally learning has been studied from a behavioural psychological viewpoint where older learners have been, for instance, tested under time-constraints on various learning and memory tasks, often against younger learners (Merriam, 2001). Conventionally, behaviouristic testing is conducted in highly controlled clinical settings with an aim of generalising results. This requires replicability of the experiments to some degree (Bracht & Glass, 2011), where research participants, or *subjects*, are expected to execute the tasks based on the explicit instructions. Commonly in these studies the roles of the researcher, the researched, and the research user are distinct units (Quinton & Reynolds, 2018).

The increase of interest in learners' perceptions and experiences brought attention to the viewpoint of participants, which is commonly studied with qualitative methods 'that are aimed at discovering how human beings understand, experience, interpret, and produce the social world' (Mason, 1996, in Sandelowski 2004, p. 893). However, learners' experiences are also studied with quantitative research methods (Araiba, 2020). When research participants describe their personal experiences or understandings, they act as *informants* who consult the researcher of the issue under investigation, mostly via questionnaires and interviews. For instance, adult learners are internally motivated and self-directed in theories of andragogy and self-directed learning (Merriam, 2001). However, participative involvement as an informant does not necessarily entail participative control of the educational event (Bagnall, 1989) or research.

Recently, there has been a spike of interest in co-production and co-research with older people. In participatory action research (PAR), those affected by the research inquiry are involved in research as part of social action (Israel et al., 2008). As research *partners*, older people become more than study subjects as they contribute their expertise bidirectionally in collaboration with the researcher (Blair & Minkler, 2009). Working together is defined 'in a way that values all contributions, and that builds and sustains mutually respectful and productive relationships' (NIHR, 2019, p. 6). It is possible to empower older people to act in all phases of research, for instance, training them in data collection or analysis (Buffel, 2018). With the experiential knowledge, researchers get to experience the partnership with the older people, as well as their help in connecting with a hard-to-reach population (Blair & Minkler, 2009). Public participation in scientific research is also often termed citizen science (Jordan et al., 2012). Many definitions of citizen science exist; however, emphasis is not only in collaboration and communication but also in open science and data management (Heigl et al., 2019). In this article we use the wider term 'partner' to refer to various ways to collaborate with older people.

Multiple methods of qualitative or mixed methods inquiry are increasingly common in research. These require the acceptance of dialectical pluralism, as there might be multiple simultaneous explanatory factors behind phenomena associated with learning (Johnsson, 2012). In study designs, there may be *multiple roles* of older people to gain an expanded understanding of how they experience their reality. Moreover, key informants

are conventionally involved in research to provide deeper understanding of the subject of interest, often having a formal role in the community of interest where they are exposed to information that is targeted by the researcher (Marshall, 1996; Treblay, 1982). Aside from participation roles, throughout history older people's learning has been studied from the viewpoint of stakeholders such as doctors or family members. Therefore, the *non-participant* role is based on practical reasons, e.g., to have easier access to stakeholders compared to older people themselves (Weil et al., 2017), or beliefs that older people are not capable of sharing their own views because of illnesses such as dementia (Kowe et al., 2020).

All in all, researchers have a significant role in influencing the research participants through choosing the research topics, research design, and methods of analysing and reporting data (Quinton & Reynolds, 2018). Furthermore, researcher's choices reflect wider processes, interactions, and epistemologies that researchers give value to (in the context of adult education, see e.g., Grummell & Finnegan, 2020). Simultaneously, wider societal and cultural expectations influence how researchers interpret actions of older people, their learning processes, motivation, and possibilities to participate in research through current policies and practices of the funding agencies and research institutions as well as participating older people.

Methods

We conducted a scoping review to examine the current research regarding the participation of older people in learning studies. Levac, Colquhoun and O'Brien (2010) define a scoping review as mapping to present the breadth and depth of a field by summarising a range of available evidence. This is done by identifying all relevant literature of a particular field. Scoping review is suited for management of larger data and more general research problems, when the actual size of the data is not easily predicted. In contrast, systematic reviews are often guided by a carefully defined research question (Arksey & O'Malley, 2005; Levac et al., 2010).

We followed the five-stage model of Arksey and O'Malley (2005) to implement a scoping review: 1) Identifying the research question, 2) Identifying relevant studies, 3) Study selection, 4) Charting the data, and 5) Collating, summarising, and reporting the results, to observe how the methodological choices of researchers reflect the choices and changes that have happened in the roles of older people in research design over recent years. Specifically, we were interested in how older people participated in roles we defined from the larger research traditions, i.e., how older people participated as *subjects, informants,* or *partners, or a combination of them in multiple roles*. Secondly, we were interested in the quantitative information of the field and how many articles were published between 2015 and 2019 in three databases.

Identifying relevant studies

Older people's learning has long been studied in gerontology and educational sciences (Kern, 2014), therefore, we covered the abstracts of scientific articles in biomedical and nursing science databases including PubMed (MEDLINE) and CINAHL as well as the educational database ERIC (ProQuest). The keywords for search included 'older adults', 'older people', and 'elderly people' and 'learning'. By using concepts of 'older adults', 'older people' and 'elderly people', we wanted to focus on studies where learners are over 65 years. In the publication from the NIHR (2019), instead of 'participation', nowadays research systemically refers to older people's 'involvement'. In research, the terms are

often used similarly, and our search strategy sought to encompass both and to observe these conceptual changes later in the research process.

We included empirical studies that were published in English in peer-reviewed scientific journals between 2015 and 2019. Additionally, we set inclusion and exclusion criteria: 1) Articles were written in English, 2) Articles were empirical studies and not reviews or non-refereed studies, such as articles in magazines, 3) Articles were available online or in databases, and 4) Articles referred to older peoples' (65+ years) learning, not learning of other people, such as younger cohorts, researchers, or professionals working with older people. Additionally, machine learning or service learning were excluded. However, learning was not always distinguishable in the abstracts, which required researcher interpretation. Decisions were based on the discussion and interpretation of both researchers in mutual agreement.

Charting the data

From the data, we extracted the following information: the authors, year of publication, name of the article, role of older people in the study (Table 1), participants (age, sample size), main results, and abstract. Additionally, information about health issues and other details, such as a younger comparison group or multiple methods in a study design were extracted.

Table 1. Roles of older people in learning studies (authors' own analysis)

Role of older person	**Definition**
Subject	Clinical studies, e.g., physiological, neurological assessments, tests
	Other way of being a study subject
Informant	Surveys, e.g., questionnaires, structured interviews
	Interviews, e.g., open, thematic, semi-structured, focus group
	Visual, artistic, creative methods
Partner	Older person as a co-researcher, e.g., identification and planning of research, gathering and analyzing research data
	Other type of active participation
Multiple roles	Multiple methods Mixed methods, e.g., questionnaire and an interview

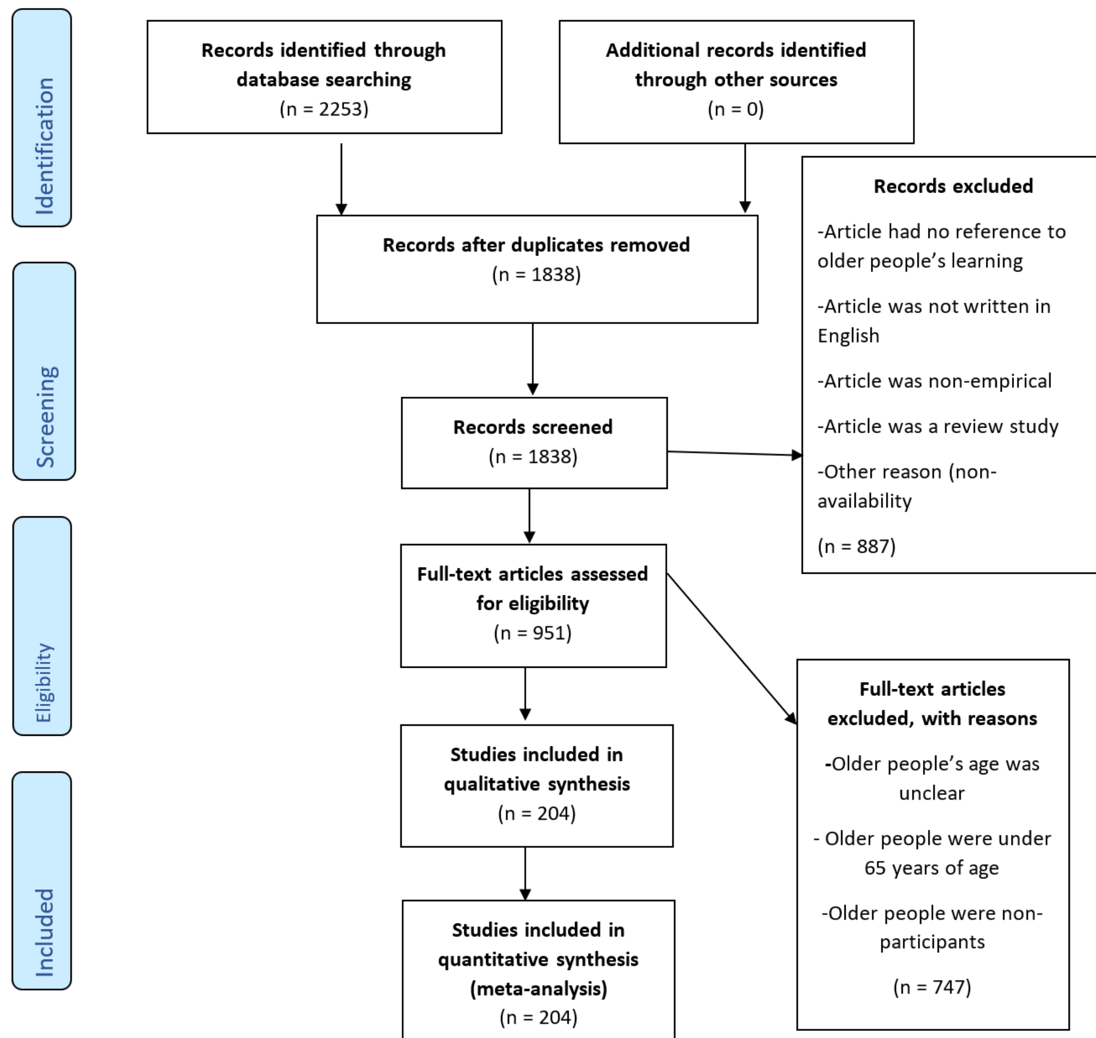
Due to the large amount of literature involved in our study, we decidedly focused on summarising and disseminating research findings, to describe the findings and range of research in a more detailed way (see also Arksey & O'Malley, 2005). To aid this, we applied methods of qualitative content analysis. Content analysis is a hybrid technique for analysis to objectively create inference from focal text to its social context, often including numerical descriptions of features, together with qualitative features of text (Bauer, 2000). First, the study abstracts were read. Next, the methodological portions of the articles were checked to support the interpretations from the abstracts. If necessary, the interpretations of the roles of older people were supported by skimming the full text article. In the results section, we classify the results by database and year, and the identified roles of older people, acquiring essential features to the field of interest. Citations in the Results section refer to reviewed articles as examples of review data.

Results

The scoping review resulted in 2253 articles, including ones added in databases subsequently between 2015 and 2019. Duplicates were removed (n=415) as were excluded articles (n=887) due to the subject of the article, language, format, and availability. Articles (N=951) were excluded due to lack of clarity in age (n=580), or where older people were under the age of 65 (n=167).

When examining the subject of articles, we excluded those focusing on other people's learning, such as student, service, and machine learning. Also, we excluded articles where older people's learning was studied by using key informants (n = 5). Eventually, 204 articles were included in the synthesis (See Supplementary material). The scoping review process is summarised in Figure 1. The review revealed that a quite even number of studies were published annually concerning the learning of older people. The number of articles varied from 25 in 2019 to 58 in 2015, being 40,8 on average.

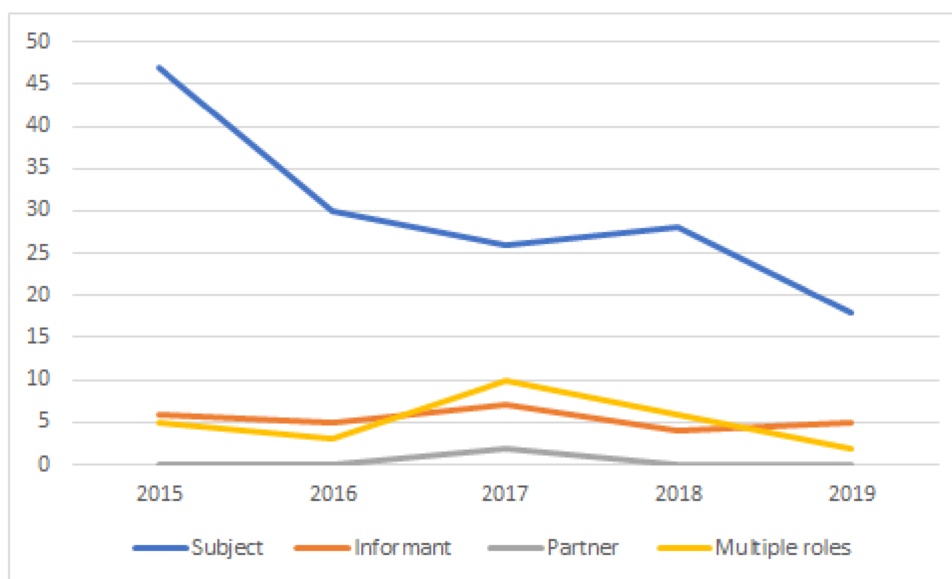
Figure 1. The Scoping review process studying participation of older people in learning studies (authors' own figure)



Older people participated in learning studies as *subjects* (73 %), as *informants* (13%), and in *multiple roles* (13%). Less frequently, older people participated as *partners* (1%).

Older people's participation in learning studies during 2015-2019 is illustrated in Figure 2.

Figure 2. Older people's participation in learning studies 2015–2019 (authors' own figure)



Older people participated in learning studies as study *subjects* in 149 (of 204) articles. Most often, they participated in clinical studies (n=149), which included tests as well as neurological or physiological assessments and experimental and quasi-experimental studies. For instance, older people participated as research subjects by taking part in brain measures (e.g., Santos Monteiro et al., 2018), in pre- and post-tests (e.g., Van den Steen et al., 2019), evaluation of different cognitive functions (e.g., Rahman-Filipiak et al., 2015), and measurements of vitamin concentrations (e.g., Annweiler et al., 2019).

Older people had the role of *informant* in 27 studies. They shared their opinions and experiences on learning via surveys (i.e., Bjursell et al., 2017; Hori et al., 2018; Åberg, 2016) and interviews or focus groups (Helterbran, 2017; Laes, 2015; Narushima et al., 2018). Studies varied from larger surveys (n=13) (Seifert et al., 2017) to qualitative interviews (n=9) with a smaller number of participants (Rawinski et al., 2017). Among surveys, interviews and focus groups, older people participated in learning studies through photographs (Breeden, 2016).

Older people had *multiple roles* (n=26) in many studies included in this review. Only one study (Boletsis & McCallum, 2017) mentioned utilising a mixed methodological approach with a questionnaire to assess older people's experiences (informant) while playing a serious game, and a correlational study to examine the scores (subject). Many studies, in turn, mentioned several separate roles in the research setting, and thus were included in the category *multiple roles*. For example, Petroka et al. (2019) utilised focus groups (informant) and observation (subject) to study healthy eating and disease self-management among older people, and Cavuoto et al. (2017) studied older people's sleeping with objective sleep quality measurements (subject) and surveys (informant).

Finally, older people had the role of *partner* in 2 articles. In Anderson et al. (2017) researchers conducted a community participatory research project where older people participated as researchers and research subjects. Data collection included individual semi-structured interviews. Strom and Strom (2017), in turn, included 20 trained resident volunteers in a grandparent education course at a large, assisted living facility.

Table 2 summarises the prevalence of each role by year. The results indicate that the role of study subject accounts for most of every year included. Additionally, studies where older people were in research partnership roles were in noticeably smaller numbers.

Table 2. Older people's participation in learning studies (N=204) (authors' own analysis)

	2015	**2016**	**2017**	**2018**	**2019**
Subject (n=149)	47 (81.0 %)	30 (78.9%)	26 (57.8%)	28 (73.7%)	18 (72.0%)
Informant (n=27)	6 (10.3%)	5 (13.2%)	7 (15.6%)	4 (10.5%)	5 (20.0%)
Partner (n=2)	-	-	2 (4.4%)	-	-
Multiple roles (n=26)	5 (8.6%)	3 (7.9%)	10 (22.2%)	6 (15.8%)	2 (8.0%)
Total *(N=204)*	58 (28.4%)	38 (18.6%)	45 (22.1%)	38 (18.6%)	25 (12.2%)

Discussion

This scoping review indicated studies with older people in different roles participating in research. Most of the current studies included older people as subjects where their learning was most often measured in a clinical setting. Simultaneously, only every fourth study included older people in the roles of informant, partner, or in multiple roles. Even though older people's roles varied considerably, they all met the definition of social participation referring to person's involvement and interaction with others (Levasseur et al., 2010). In comparison, only five articles were excluded, where older people were non-participants and older people's learning was researched from the viewpoint of key-informants such as professionals or next of kin. This review indicates that learning of older people is, therefore, mostly studied through their participation in research.

Community participation, as a part of social participation, takes place outside of home (Chang et al., 2013). The differences in research settings can be seen in this review study. A community aspect was reflected mostly in studies where older people were co-researchers but also partly in studies where they shared their perceptions or experiences via surveys, interviews, focus groups, or photographs. Compared to that, empirical-analytical methods and measurements of learning of older people have employed a behavioural psychological viewpoint in learning that requires highly controlled clinical settings for learning tests (Merriam, 2001; Bracht & Glass, 2011). Differences in research conditions reflect the change in the research of the older people's social world that has gradually shifted from the medical settings to the communities (Weil et al., 2017). Simultaneously, the emphasis of empirical-analytical methods can partly reflect the multidisciplinary research theme and the selection of the databases in this review to include both biomedical and educational databases.

This scoping review indicated studies with older people in active roles in all phases of research. In these two studies, older people were included as researchers in a participatory study (Anderson et al., 2017), or had an otherwise active role as resident volunteers in an education course for assisted living facility (Strom & Strom, 2017). This involvement in research allows for older people's influence on the learning situation, enhancing their personal and community capacity (Blair & Minkler, 2009), and co-learning between the researcher and the older person (Minkler, 2010). There may be a transfer of new skills into daily lives of older people that are used in everyday problem-solving and that support their overall wellbeing (Anderson et al., 2017).

Research involvement can be seen as part of civic engagement, which would have an aim to influence future policy (Scharf, 2001). Since social participation is seen as an important part of older people's rights and healthy ageing (Aroogh & Shahboulaghi, 2020; Kouvonen et al., 2012; Niedzwiedz et al., 2016), partner roles support the recommendations of the WHO (2020) for strengthening involvement of older people in research more than the roles of subject or informant. Simultaneously, key to adapting research, services and products to suit older people lies in consulting older people's experiential knowledge (Chen et al., 2020).

This review study revealed a lack of participatory methods in researching older people's learning. To develop research methods in line with international initiatives (UN 2015, WHO, 2020), learning studies of older people could utilise more qualitative and participatory methods, including creative, innovative, and arts-based approaches to support older people's active participation in research in multimodal ways. Researchers should gain more knowledge and experience on existing methods as well as develop new innovative methods to enable participation in research. Existing, conventional methods, such as questionnaires and interviews, can also be used in more participatory ways. Researchers can, for example, adjust research questions or discuss transfer and utilisation of the results in focus groups with older people. This also requires reflection of researchers' roles (see Wittmayer & Schäpke, 2014). Digital technology may also provide creative means to increase participation of older people since it enables the roles of the researcher and the researched to blur (Quinton & Reynolds, 2018). Halfpenny and Procter (2015) claim that digitalisation has supported the democratisation of research processes by increasing opportunities to participate in various types of research projects.

Different roles enabled different ways to participate for older people. The empirical-analytical study design, such as measurement as a basic practice, may restrict the access to older people's viewpoints where research participants are research subjects. A merely participative presence in research does not necessarily meet the aims of age-friendly initiatives of intergovernmental organisations (WHO, 2015), which encourage the development of innovative models for the involvement of older people in research. Wider involvement of older people in clinical research can be further supported by, for example, implementing critical and dialogical mixed methods research approach that expand participation of learners in research activities (e.g., Taylor & Raykov, 2020). Public perception needs to allow for more diverse view of older people and aging, and one way to accomplish this is through diverse research methodology and data (Woźniak, 2020; Buffel, 2018). Due to the diverse phenomena of ageing, consideration of multiple paradigms as well as practicing both qualitative and quantitative research is advised (Łuszczyńska, 2020). We conclude that various methodologies are needed to study the complex issues of learning and ageing.

Finally, critical and ethical considerations are needed to notice that all older people do not want to or can participate in research and other activities in a community or society (see also Martinson & Minkler, 2006). Simultaneously, co-research may not fit

for every research but through critical examination of conditions, co-production of research could flourish (Beebeejaum, 2015). Critical planning is also needed in considering who is involved in a participatory study. Often, people involved in research are more active, younger, and generally in better condition (Michelet et al., 2014; Murman, 2015) compared to non-participants. The active ageing paradigm has been criticised for not reflecting the diverse ageing experience of older people, as it emphasises physical health, independence, and productivity (Ranzijn, 2010). Future research should search for various ways to involve various voluntary older people in learning studies so that they are provided with opportunities for the individual and communal benefits from participation in community through research activities. Further studies are also needed on how meaningful engagement and participation are supported in research activities. The possibility to choose the role in research can increase motivation and possibilities of older people to participate in research and this should be carefully considered when planning and implementing the research projects.

Limitations of the study

There are some limitations to this study. Interpretations of roles of older people and their learning were based on the abstracts of articles. Reading the whole articles would provide a deeper understanding of the reviewed studies. However, two researchers questioned the validity of analysis about ambiguous abstracts and resulted in consultation of each other about this potential limitation. Additionally, the review produced only 25 articles from 2019, which is markedly less than in previous years. Without including articles from 2019, the average number of publications per year is 44,75. We assume the databases add articles subsequently, and thus we did not have access to all articles from 2019. Despite this, included articles are similar in content compared to articles from previous years.

The choice of the databases also has an effect on the review results. In this scoping review, we wanted to answer the research question from the multidisciplinary viewpoint to reflect the versatility of these learning studies. Older people's learning has long been a part of gerontology and geriatrics, while younger people's learning is associated with educational sciences and immediate sciences, such as psychology and sociology, however, this division is not categorical (Kern, 2014). Educational sciences have a lot to offer to research about learning of older people, especially to aspects concerning their attitudes and motivation, skills, and individual needs in learning, as well as enabling and supporting their learning through physical, social, and psychological learning environments. However, limiting the review only to educational sciences databases would have narrowed the scope and affected the results.

Conclusion

This review highlighted the strong emphasis of traditional learning research designs and participation roles of older people. Only few studies had older people in more active roles in research. Various roles have both strengths and weaknesses as well as different research focuses and, therefore, are all needed in providing a comprehensive view in older people's learning studies. However, the scarcity of partner roles in the reviewed studies raises concerns on limited possibilities of older people to actively get involved in a society through participation in research activities. Participation in research holds potential in providing meaningful and social activities to older people that support their wellbeing, learning and quality of life. This study is in line with the recommendations of the WHO

(2020) that calls for more qualitative and participatory approaches to support healthy ageing and meaningful engagement of older people in society. Research partnerships with older people are not, however, a panacea to all research activities. Partnerships require active participation and self-reflection from the researchers who may challenge the implicit power relations and self-evident practices in research. Researchers need to be aware and reflect on possible factors and influences concerning research ethics, power, well-being, and quality of life of older people as well as implementation of research activities. Currently, change in methodologies is still slowly unfolding (Buffel, 2018), as well as its influence on participative roles. This review urges researchers to take a more active role in initiating research partnerships with older people to support older people's involvement and the diversity of older people's experiences in learning research.

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Autobiography and social climbing. The inevitable compulsion on self-reflexivity and its variants

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Abstract

The following essay touches on a highly interesting problem for politically sensitive adult education: What are the 'costs' of educational advancement? The answer is sought in biographies of three prominent examples: Pierre Bourdieu, Annie Ernaux and Didier Eribon. The data is based on autobiographically oriented reflections of the protagonists – symptomatically not 'classic' autobiographies. The concentration on France has to do with the fact that in the French cultural tradition this level of reflection – not least through the works of the selected authors – has gained a particular meaning. The selection itself relates to astonishing differences in the influences of historical times and the relevance of cohort experiences. The result of the analysis is undoubtedly an 'essayistic dramatisation', not a hasty generalisation, but it could stimulate scientific discussion and systematic empirical research.

Keywords: anti-autobiography, habitus split, I-less remembering, social shame, compulsion to self-reflexivity

Introduction

Reflection and return are inseparable,
they belong together and mingle.
Complexity and uncertainty arise from this reflexivity.
(Eribon, 2017, p. 9)

Modern societies are 'climbing societies' (Nolte, 2008). The chance to break out of cramped living conditions, material misery and poor education is one of the basic rights

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in modern democracies. The fact that this 'opportunity for everyone' (Kauder & von Beust, 2008) could only be an 'illusion' on closer inspection (Bourdieu & Passeron, 1971) does not put into perspective the fundamental statement of the possibility of advancement. In Western societies, the 20th century is full of such biographies of social climbing – remarkable educational advancements, successful sports or economic careers, unexpected popularity in the cultural field (cf. Alheit & Schömer, 2009, 2014; Alheit, 2018). What is usually overlooked are the 'costs' of such ascension processes. The German-English sociologist Ralf Dahrendorf, who caused a sensation in 1965, above all with his essayistic plea entitled 'Education is a civil right' (cf. Dahrendorf, 1965a), has submitted a typical sketch of the climber in his 'Book on Germany' (Dahrendorf, 1965b), which was published in the same year:

> The path from the bottom to the top, which we have made into a metaphor for a society with equal objective and subjective opportunities, is certainly not a direct path to happiness. […] English authors have elevated the scholarship boy to a literary figure, a social type who, due to his achievements, has worked his way up from a working-class kid to an academic,. He is a sad, torn character. As a child, he was encouraged when his parents, siblings and relatives said he had brains, although even the frequent praise was accompanied by a hollow tone of alienation [...] Later, at university, the loneliness took hold a new shape. He no longer saw his parents and their house every day, … but the others saw his parents' house in him – and again he didn't belong to them. (Dahrendorf, 1965b, pp. 131-132)

Social upclimbing seems to involve sacrifice. In the following essay, I am interested in three 'quasi-autobiographies' by authors who at least cannot be perceived as 'sad figures'. Whether their ascents can be interpreted as 'direct paths to happiness' must remain open for the time being. A certain fascination for French culture determines the selection of the autobiographical works. The most provocative document is undoubtedly Pierre Bourdieu's 'sociological self-experiment' (2002), a kind of 'participatory objectification'[1] not of his own experiences but of the 'social possibility conditions' of these experiences (Bourdieu, 2010). The autobiographical 'memory book' The Years by Annie Ernaux (2008/2019) is similar to this format – precisely because it deliberately breaks with the conventional rules of autobiographical writing. Finally, Didier Eribon's highly successful autobiographical-political essays, Return to Reims (2016) and Society as Judgment (2017), also belong in this context. What the selected examples have in common is the fact that they tell of complicated ascents from lower social classes, which include not only extraordinary successes but also damages. In the following three sections, essential aspects of the selected autobiographical documents are worked out – and compared and appreciated in a concluding, more essayistic consideration.

The 'anti-autobiography': Pierre Bourdieu's sociological self-experiment

Bourdieu's 'self-experiment' is perhaps so irritating because it does not only elude any aesthetic stylisation, but also at times overextends the gesture of observing the author himself while observing his own history – what he calls 'participatory objectification' – in such a way that an access to the person 'Bourdieu' is simply possible in a few passages and here only indirectly.

The first sentence of the self-experiment is a kind of 'preamble': 'I do not intend here to pay homage to a type of writing that I have said often enough how pleasing and at the same time deceptive it is: the autobiography.' (Bourdieu, 2002, p. 9; translation

by the author) Consistently this announcement is not followed by chronological references to his life story, but rather brief reflections on his 'work history' (Bourdieu, 2002, p. 10-11) and then excessive descriptions of the so-called 'Khâgne', the two-year preparatory class ('classe préparatoire') to the École Normale Supérieure, and of studying at the ENS itself, specifically: the encounter with the 'normalien philosophy' of the 1950s. This extravagant section (Bourdieu, 2002, pp. 11-45), which focuses on the contrast between Jean Paul Sartre, the French intellectual per se, and Georges Canguilhem, the political critic of science, is not introduced with memories but with a programme of reflection: 'Understanding means first of all understanding the field with which and against which one develops.' (Bourdieu, p. 11; translation by the author)

There is no question that Bourdieu hated the format of autobiography. The polemical reference in his essay L'illusion biographique to the 'complicity' between autobiographers who are interested in an 'orderly story' and researchers who see themselves as 'meaning seekers' (Bourdieu, 1990, pp. 76-77) proves this convincingly. The fact that he gave in to the wish of friends to present his last lecture in the series La science de la science at the Collège de France as a 'sociological self-experiment' is a concession and certainly not an act of persuasion. His plan to publish the resulting text, which was compiled with the aforementioned speech on the awarding of the Huxley Medal, first in Germany and only later in France also speaks for this (cf. Schultheis, 2002).

Just in a few places does the reconstruction of that field of the 'normaliens', i.e. the undisputed and privileged cultural élite of France, give the impression of a personal relationship. Much clearer is the emphasis on foreignness and distance. Notes on Fernand Braudel, the famous historian and member of the 'Annales School', who, as Bourdieu puts it, 'even when he criticised my early work on Algeria because he found too little history in it, he commented my research […] always very friendly and trusting' (Bourdieu, 2002, p. 40; translation by the author), testify to a certain warmth and respectful approach. But that is – apart from the careful appreciation of the influence of Georges Canguilhem – the exception. On the other hand, he uses the mention of Raymond Aron (to whom he – ironically – 'owes an eternal debt of gratitude' (Bourdieu, 2002, p. 40), for having offered him an assistant position at the Sorbonne in 1960, shortly before the military coup in Algeria) to criticise the subtle effectiveness of the social networks of the established 'normaliens' (Bourdieu, 2002, pp. 40-42). Particularly Aron's rejection of his Algerian research work as a dissertation with the remark: 'That would be unworthy of you' (Bourdieu, 2002, p. 42; translation by the author), Bourdieu regards as an indication of 'a perfect form of symbolic violence, because one succumbs to it during the process of practicing it' (Bourdieu, 2002, p. 42; translation by the author).

Basically, for Bourdieu, the Algerian experience is a real 'process of change'[2] in several respects. His refusal to become an officer actually leads him to Algeria as a simple soldier and confronts him with a culture on the way to modernity, in which the image of his own – French – culture, and in particular the academic variant of this culture, is reflexively broken. 'This attitude,' he describes his critical position, 'displeased me for a long time, and the rejection of the world view suggested by university philosophy of philosophy certainly helped to introduce me to the social sciences' (Bourdieu, 2002, p. 50; translation by the author). But it is not just an ethnologically enlightened form of sociology that Bourdieu develops for the first time in his Sociologie d'Algérie. There is also a conscious turning away from what he calls the 'ahistorical' ethnology of the Sad Tropes[3], as embodied by Lévi-Strauss, which – just

like the philosophy of philosophy – celebrates an aestheticising distance from the social world (Bourdieu, 2002, p. 50).
For the ‘process of change’ discussed here, Bourdieu chooses the metaphors of ‘initiation’ and ‘conversion’ (Bourdieu, 2002, pp. 68), which are reminiscent of religious developments – precisely because he now uses the results of his ethnological research in Kabylia that he achieved through targeted objectification, and transmits it on an amazing phenomenon of his native region, the Béarn.[4] To ‘alienate’ the familiar, to ‘reverse’ one’s gaze, so to speak, to no longer tacitly assume what is given, but to observe it with sensitive interest, is a new stage in Bourdieu’s scientific maturation process, which surprisingly releases personal feelings:

> But, as if to prove that this heuristic path also has something of an initiation process, through the total immersion in this environment and the happiness of the reunion that accompanies it, a reconciliation with things and people is fulfilled, from whom I had imperceptibly distanced myself and which an ethnographic attitude naturally obliges us to respect: the friends of our youth, the parents, their behaviour, their habits, their pronunciation. A whole part of myself is restored to me, the one that made me like them and at the same time alienated them because I could only deny it by denying them, under the ban of the shame I felt for them and myself—the return to the origins is accompanied by a still controlled return of what has been suppressed. (Bourdieu, 2002, pp. 70-71; translation by the author)

It seems interesting that in Bourdieu’s ‘self-experiment’ after this astonishing ‘initiation process’ and immediately before remembering his own family – as it were: the ‘most personal’ passages of the ‘anti-autobiography’ – the relationship to Michel Foucault is addressed (Bourdieu, 2002, p. 89), for Bourdieu obviously also a figure associated with ‘closeness’. Unlike the intellectuals of the field mentioned so far, ‘almost all essential peculiarities’ are presented as similar to his own (Bourdieu, 2002, p. 90): Foucault, like him, is ‘normalien’, only a few years older, interested in comparable philosophical traditions, impressed by Canguilhem like himself; both are critical of the ‘normalien mainstream philosophy’ and remain – despite their remarkable international reputation – rather ‘outsiders’ in France. Two striking differences, however, cannot be denied: Foucault comes from a ‘bourgeois family’ and he is homosexual. Another difference seems worth mentioning to Bourdieu, but at the same time it is by no means surprising. While he himself ‘converts’ to ethnology and then to sociology and further develops his working methods in research teams, Foucault remains true to philosophy in a very universal understanding and thus also to the expectations of the intellectual field, which prefers the gesture of the classical scholar to cooperative research practice. Here Foucault’s habitus of origin could be the hidden cause.

Bourdieu’s milieu of origin is that of the ‘little people’. The father, son of a sharecropper, first a postman, later post office manager in a small village in the Béarn region, is resistant and politically left-leaning. At the same time, however, he strives for his respectability, which Bourdieu connects with the touching image of his attempt to turn the old farmhouse in which the family lives into a representative domicile. The mother, daughter of a respected peasant family, who, from the perspective of the relatives, married ‘highly inappropriate’ (Bourdieu, 2002, p. 98), shares this need for recognition and tries – unsuccessfully – to transfer it to him as well.

The distance from the family milieu comes gradually. The difficult time at boarding school, during which he – similar to the ‘scholarship boy’ – experienced the dilemma of alienating himself from his family on the one hand and remaining a stranger in the world of boarding school on the other, gave him a feeling that he later called ‘split habitus’ (Bourdieu, 2002, p. 116): belonging to the ‘intellectual world’ and

abhorring its 'inveterate conformism' (Bourdieu, 2002, p. 120), reluctantly accepting the consecration of a professorship in sociology at the Collège de France, and in the inaugural lecture to explicitly distance himself from this consecration:

> To describe the ritual in fulfillment of the ritual was to commit an unprecedented act of social barbarism, which consists in suspending, for the time being, or worse, in jeopardising the belief in a moment and in a place where it was about celebrating and consolidating it. During this process, I had to recognise that what for me was the psychological resolution of an inner contradiction meant a tremendous challenge to the symbolic order, a violation of the dignity of the institution, which demands silence about the arbitrariness of its rites in the course of their performance . (Bourdieu, 2002, p. 123; translation by the author).

There is no doubt that the 'split in habitus' that Bourdieu speaks of represents a kind of belonging deficit in two respects: the painful loss of his identity of origin and the enduring distance from the 'intellectual world'. But the compulsion to reflect that arises from this, the 'participatory objectification' is at the same time a motive for healing. With the 'ethnological attitude' towards the region of origin and its culture, the social shame of the young intellectual can be shed and a 'reconciliation' can take place.

'I-less remembering': Annie Ernaux's impersonal autobiography The Years

Annie Ernaux also comes socially from 'humble beginnings'. Her parents started out as workers, later running a small grocery store with a café in the Normandy town of Yvetot. Despite a remarkable educational career and international success as a writer, she does not construct herself as the sovereign 'manager' of an ego that is aware of its importance, rather as a highly sensitive and always self-critical 'passerby between the social worlds'. For her autobiographical memoir, she almost completely avoids the use of this 'I' and replaces it with 'one' or 'she', more rarely with 'we':

> She has begun a novel in which images of the past, the present, night dreams and visions of the future alternate in a self that is a double of herself.
>
> She is certain that she has no 'personality' (Ernaux, 2008/2019, p. 91; translation by the author)

Between the two sentences, 'All images will disappear' (Ernaux, 2019, p. 9) and 'To save something from the time in which one will never be again' (Ernaux, 2019, p. 256), Ernaux unfolds her 'impersonal autobiography' (Ernaux, 2019, p. 253). As an 'ethnologist of herself' (Ernaux, 2019, p. 2), she does not present herself as the protagonist and rarely as an actor of the events, but rather as their 'recorder', who is extremely frugal with explanations and causal connections. Introductions to new sequences of events are often linked to private photographs and video recordings, which initially only emphasise what is immediately obvious and merely secondarily the social contextualisation. This creates an idiosyncratic dynamic that draws outsiders into the progression of events:

> A flow that is constantly interrupted by photos and video sequences documenting the successive bodily forms and social positions of her being – they are stills of memory while showing the course of her life, what makes she unique, not through the externals (social path, job) or inner elements (thoughts and longings, the need to write) of her life,

> but through their individual combination. The woman who is 'always someone else' in the photos is reflected in the 'she' of the story. (Ernaux, 2019, p. 253; translation by the author)

Ernaux seems to choose a kind of 'biographical micro-perspective' into which major social events 'break in' from the outside as it were: the aftermath of World War II, the memory of the German occupation, National Socialism, the Resistance and liberation by the Allies, which the collective Family narratives still dominate in the late 1940s and the 1950s; also the Algerian war, Beauvoir's feminism, May '68, the 'consumer society' of the 70s, which replaced 'the ideals of 1968' (Ernaux, 2019, p. 122), Mitterrand's election victory in 1981, the false hopes associated with it, and as an overarching theme, the deeply felt experience of her own emancipation as a woman (Ernaux, 2019, pp. 212-220):

> With her book, she wants to save everything that has ever surrounded her, wants to preserve the circumstances. And isn't this feeling also dependent on history, on the changes in the lives of women and men? – Perhaps she can only feel it because as a fifty-eight women she can lie next to a twenty-nine-year-old man without being ashamed, but also without being particularly proud of it. (Ernaux, 2019, p. 215; translation by the author)

As an 'ethnologist of herself', she finds a convincing balance between the 'outer' and 'inner elements' of her memory, discovering her own way of seeing society from the perspective of the subject and observing it at the same time and often with ironic distance. This literary format is the basis of a fascinating reconstruction of the 'social time' she is confronted with:

> The form of her book, then, can only emerge as she delves into her own memory images and looks at the characteristics of the epoch or year they roughly come from – as she gradually brings them together with other images, remembering what people said, how they commented on events and things, when she picks her words out of the mass of communications, out of the background noise that constantly formulates how we should be, what we think, believe, fear, what we should hope. She wants to reconstruct a social time from the imprint that the world left on her and her contemporaries, a time that began a long time ago and continues to this day – she wants to find in an individual memory the remembrance of the collective memory and thus to fill history with life. (Ernaux, 2019, p. 252; translation by the author)

Annie Ernaux's entire literary work is autobiographically tinged. As Franz Schultheis plausibly describes, the courageous, unpretentious and unsparing confrontation with herself and her time has a different format and yet similar effects to Bourdieu's epoch-making major work The Distiction:

> In France, almost four decades ago, parallel to Bourdieu's Distinction, Ernaux had developed an electively related and in many respects complementary literary view of the French class society. (Schultheis 2020, p. 13[5]; translation by the author)

The basis of Ernaux's lasting impact is the coincidence of the influence of two female figures who could not have been more different: her mother and Simone de Beauvoir. She says about her mother: 'More than receiving, she loved to give to everyone', and about the Beauvoir: 'Isn't writing also a way of giving?' (Ernaux, 2007, pp. 110-111) Her mother made it possible for her to study through her ambitions. And Simone de Beauvoir opened her 'eyes' with her main work The Second Sex:

> All the things I had experienced in the years before in darkness, suffering and malaise suddenly brightened up. This experience gave me the certainty that awareness – even if it does not solve anything in itself – is the first step towards liberation and action. (Ernaux, 2003, as cited in Eribon, 2017, p. 110; translation by the author)

The paradox of this Janus-faced generosity of two women is the fact that the maternal commitment enables Ernaux to undergo an educational process that brings her intellectually close to the Beauvoir and, inevitably, distant from her mother. This process in turn is associated with a double shame, a deep guilt towards the family of origin – and especially the mother – and a social shame at entering the 'intellectual world'. In no other of her books has Ernaux analysed this experience – triggered by a memory of her father's attempted murder of her mother – more mercilessly than in the work Shame (Ernaux, 2000/2020). It begins with the sentence: 'In the early afternoon of a Sunday in June, my father wanted to kill my mother.'

Between this sentence, which recalls the repressed feelings of the eleven-year-old girl at the time, and the final sentence from The Years, 'To save something from the time in which one will never be again' (Ernaux, 2019, p. 256), lies an amazing woman's life. The problem of social shame and the cultural, social and religious limitations of the milieu of origin have been revealed. The relationship with the mother is dealt with in the small volume Faces of a Woman (1987/2007). Ernaux's 'self-ethnology' may not be a method that leads to 'reconciliation', but it does lead to a critical and realistic appreciation of the things and processes of her own life.

'Return' as turning away? Didier Eribon's radical *'socioanalysis'*

Retour à Reims, Eribon's autobiographic-political essay, seems to hit a 'nerve of the time' and, unlike Bourdieu's 'sociological self-experiment', it becomes a bestseller in France and Germany. In addition to the literary-journalistic elegance of the text, two motives are probably particularly decisive: a morally and politically convincing variant of 'Farewell to the Proletariat'[6], which – at least regarding the time of the German and English translation (Eribon, 2016) – coincides with the disturbing right-wing populist Trump election in the USA, and the open discussion of his homosexuality, which fits perfectly into the contemporary LGBT*IQ discourse.

For Eribon, his working-class background is a terrain of great social shame. It touches him more deeply than the sexual shame he associates with his homosexuality. Basically, the homophobia of his father and the entire milieu he represents (Eribon, 2016, pp. 22-23) is the easily morally justifiable pretext for leaving his past behind. And yet an ambivalent bond remains. This becomes clear to him using the example of a character in a novel by Paul Nizan: 'Derogatory judgments about the working class, expressed by people from a new social environment that has become his own, hit him as if they were directed not only against his former milieu but also against himself.' (Eribon, 2016, p. 24; translation by the author) At the same time, he could no longer bear direct encounters with people from this milieu, including his parents or grandmother, and it overcame him

> a feeling of shame that is difficult to describe in the face of behaviour and ways of speaking that differed massively from those of his new social environment, of worries and needs that were a world away from his own ones, of statements that unite in every single conversation a primary, compulsive and actually unfounded racism. (Eribon, 2016, p. 25; translation by the author).

But instead of interpenetrating this sense of shame and understanding the 'class distance' behind it, he – at least initially – hid behind the new gay identity and constructed himself as a 'gay child', as a 'gay adolescent', not as a 'working class kid'. His desire to distance himself from the world of his family becomes comprehensible in the impressive autobiographical passages that he devotes to his relationship with the older brother. He is the type of proletarian macho who is bored by school, who is interested in football and who spends his free time drinking with friends and 'picking up' girls. 'By providing me with a counter-example, my brother was my benchmark. I wanted to be the exact opposite of him in everything.' (Eribon, 2016, pp. 103-104; translation by the author) And the distance becomes reality: 'For thirty-five years I have not seen this brother with whom I spent my childhood and part of my adolescence.' (Eribon, 2016, p. 103; translation by the author)

However, how deep the break with the milieu of origin actually is becomes clear only in Eribon's analysis of the change in the political orientation of the French working class. Using the example of his parents and brothers, he realises that the traditional 'communist' orientation and the 'natural' 'leftism' in the milieu only had a limited connection with enduring convictions. The actual motive was to 'reject in a very pragmatic way what one suffered from in everyday life. It was about protest, not a political project inspired by global perspectives' (Eribon, 2016, p. 38; translation by the author). If, in the 1960s or 1970s, the positions represented in everyday life in this 'left' working-class milieu, especially towards the Maghreb migrants, had been raised to a political programme, the difference to the right-wing extremism of the Front National would probably have been extremely small (cf. Eribon, 2016, pp. 133-135).

But Eribon doesn't care about the polemical discrediting of the classe populaire, the French popular class. He blames the French left for this development:

> The socialist left underwent a radical transformation that became more evident every year, engaging with questionable enthusiasm with neoconservative intellectuals who, under the guise of intellectual renewal, set out to empty the very essence of the left. There was a veritable metamorphosis of ethos and intellectual coordinates. The talk was no longer of exploitation and resistance, but of 'necessary reforms' and a 'restructuring' of society. (Eribon, 2016, p. 120; translation by the author)

It is quite understandable that the radical right could then use the irritated political consciousness of the popular classes and cause a dramatic shift to the right with racist prejudices against migrants, with nationalist slogans and with hatred of the 'élites'. Eribon does not become a political renegade by turning away from his milieu of origin. He remains an intellectual leftist, movingly combining his educational advancement with reading Bourdieu's major work The Distinction (1979):

> I felt that this book shed light on my present and my past, but more importantly on the connection between the two. […] Yes, this book spoke of me and gave me the keys to understand. (Eribon, 2017, p. 63; translation by the author)

The second reminiscence of a Bourdieu reading is linked to the beginning of his writing on his Retour à Reims. He reads the 'sociological self-experiment' for the second time and comes across the coincidence of the birth years of Bourdieu (1930) and his father (1929). The years of death (2002 and 2005) are also close together. The statement that 'My father and Bourdieu were contemporaries' (Eribon, 2017, p. 102) suggests, with reference to himself, the hasty conclusion: 'Of course I know that the simplest reading in Bourdieu must see the father figure that my father didn't represented to me.' (Eribon, 2017, p. 103) But he defends himself against this psychoanalytic reflex of attributing all

conceivable social forms of reference to the family structure and, taking a literary detour via Richard Hoggart, Georges Dumézil and Mathieu Lindon, brings Foucault into play. He was just as formative for him as Bourdieu, but from the outset represented a different form of reference, namely friendship, which he then also claimed for Bourdieu – as a 'iological friend' (Eribon, 2017, p. 105) – because through his origins he had similar 'habitual reflexes' and similar insecurities like himself. Comparable with Foucault in overcoming his sexual shame, Bourdieu was central to understanding his social shame.

> One can read Madness and Society and The Distinction as two magnificent attempts at self-analysis, indeed at theoretical and political self-reappropriation. […] Through their work of thinking about themselves and about the mechanisms of domination to which both were subjected, they formed a theoretical analysis that became a message for all (or at least a message addressed to all those who have to pass similar exams and go through similar difficulties). (Eribon, 2017, pp. 106-107; translation by the author)

Here Eribon names the theoretical foundations of his reflexively broken return to his milieu of origin. However, the 'remembrance walk to Reims' is not a 'reconciliation' – as with Bourdieu. The break with the father and probably also with the brothers is definitive. And the mother's visit after his father's death also makes the ambivalence and fragility of the relationship perceptible. Eribon finds in Annie Ernaux the dialectical 'solution' to his feelings when writing 'Return' (Eribon, 2017, p. 95): 'The thin line of writing: to rehabilitate a way of life that was considered inferior while at the same time denouncing the alienation it brings with it.' (Ernaux, 1988, p. 40; translation by the author)

Variants of the compulsion to self-reflexivity

But did both, Ernaux and Eribon, really 'rehabilitate' the way of life of their milieus of origin? Did they at least accept that 'ethnological attitude' that Bourdieu could bring to his native region? – Ernaux calls herself an 'ethnologist of herself', but the razor-sharp analysis (L'Écriture comme un couteau) with which she 'dissects' herself and her culture of origin, for example in The Shame, does not give the impression of an 'obligation to respect', which Bourdieu adopts in his Béarn study (2002, p. 71). Eribon's brusque demarcation from his older brother ('I wanted to be the exact opposite of him in everything.'; Eribon, 2016, pp. 103-104) and the purposeful maintenance of this aggressive distance over decades are even more in contrast to that 'ethnological attitude'. That leaves three variants of this self-reflexivity, which is apparently unavoidable for climbers.

However, the examples are not chosen arbitrarily. The comparison presupposes targeted contrasts. Bourdieu, Ernaux and Eribon belong to distinct birth cohorts. Bourdieu (*1930) is a representative of those young European intellectuals who were shaped by the Second World War and National Socialism, including Michel Foucault and Jacques Derrida in France, Jürgen Habermas in Germany and Zygmunt Baumann in Poland (resp. England). Annie Ernaux (*1940) is a member of the generation cohort that later produces the protagonists of the '68 movement. And Didier Eribon (*1953) belongs to the 'vanguard' of that innovative social class that the German sociologist Andreas Reckwitz identified in his current diagnosis of the times The Society of Singularities (2017) as the new rising middle class, which works in the so-called 'creative industries' (architecture, advertising, design, fashion, music, film, mass media,

publishing, science, etc.) and represents the avant-garde of left-liberal identity politics, but also of a new 'cultural capitalism' and its protagonists.

However, what distinguishes Bourdieu from the intellectual contemporaries of his cultural prominence is in fact his social background. The vast majority of the personalities to be named beyond those mentioned as examples come from the upper class or the upper middle class in their countries and are – unsurprisingly – male. Bourdieu's educational path up to his exposed position at the Collège de France does not only require habitus transformations, but – as he says himself – the experience of a 'split' in habitus. At the same time, he ventures the transition from an 'archaic world' of rural Béarn to an 'intellectual world' of 1950s Paris, which is comparatively conservative in its own way, and above all to that 'Khâgne', that represents probably one of the sharpest academic distinction procedures in the world . In terms of biographical theory, one could pointedly speak of a 'splitting of the ego' - or more precisely: that cognitively accessible part of the 'self' identified by Mead (1973), i.e. a 'splitting of the Me'. Bourdieu, although he abhors the structural conformism of the 'intellectual world', will establish himself in this field like his bourgeois contemporaries. He is a harsh critic, but he stays in the field. Paradoxically, he can even 'reconcile' himself with his culture of origin using instruments from this field (the 'ethnological attitude').

As is typical for her generational context, Annie Ernaux has it easier at first glance. She belongs to the age cohort that is already benefiting from the educational reforms that began to be implemented in most Western European countries in the 1960s. The social space seems to open up. An intelligent daughter from a modest background has a chance – e.g. if the mother is committed to her daughter's studies. This is the case. But the daughter remains a 'daughter'. She cannot completely escape her mother's expectations and feels deep social shame at the ever-increasing distance. The identification with Beauvoir's feminism, with the political May '68, the conscious giving up of marriage, the commitment as a socialist and the beginning of an autonomous existence as a university teacher and writer gives her the chance to get involved in the flow of events – even more: a letting go of 'I' into which she is forced by the conventions of her culture of origin and the omnipresent expectations of her gender role. She becomes an 'ethnologist of herself', is able to remember 'I-less'. The exhilarating image of the fifty-eight-year-old who can lie next to the twenty-nine-year-old without shame, but also without pride (Ernaux, 2019, p. 215) is a metonymy for the freedom gained. And at the same time it is a symptom of the aesthetically ever-present self-reflexivity that makes it possible to 'immerse' in The Years.[7]

It almost seems like Eribon found it easiest to overcome sexual and social shame. The major works of two great theorists, Foucault and Bourdieu, become 'enlightenment books' of his early intellectual development. However, his own presence in the 'intellectual field' does not only have academic connotations – as with Bourdieu. He also works as a journalist and writer. Above all, his social position is not determined solely by professional success. It has to do with his homosexual identity, with the conscious belonging to a group that has traditionally been marginalised and discredited, but which takes on a central symbolic function in the emergence of a new social class and political style. But this new status also means a definitive departure from the homophobia of his milieu of origin. The Return to Reims is actually a farewell to the proletariat in the classic sense – not an ideologically ironic 'Adieux', but the real turning away from the past of origin and the way to a kind of 'new self'.

'Split I', 'I-lessness' and a 'new I' are symbols for the profile of three prominent climbers, who also express interesting problems of their generation cohorts. The three

examples have in common the extraordinary success and the deep shame it causes. Each person represents something highly individual, and at the same time the general becomes visible in everyone. In the reflective complexity of the biographies discussed, the learning process of social advancement, its sacrifices and successes, its losses and gains is a plausible metaphor for educational paths in the modern age. This process is, as Bettina Dausien, Daniela Rothe and Dorothee Schwendowius summoned it up very aptly

> in its concrete form individual, but it remains bound to the social contexts in which it takes place and therefore also shows social-structural patterns. As Bourdieu described for the class habitus, the attitudes towards experience of the acting individuals also carry the potential and limits of the social space in which they were formed. Concrete experiences of exclusion, having to and being able to fight one's way through, experiences of recognition and the effectiveness of one's own actions leave traces and shape the subject's attitude towards new situations. In principle they are open to change, but change takes time – a 'self-logical' biographical time. (Dausien, Rothe & Schwendowius 2016, p. 58; translation by the author)

Notes

[1] *L'objectivation participante* was the title of the lecture that Bourdieu gave at the Huxley Medal ceremony in London on December 6, 2000, and which already anticipated the basic sound of his 'anti-autobiography' (cf. Schultheis, 2002, p. 133).

[2] In his concept of the 'cognitive figures of autobiographical impromptu narration', Fritz Schütze convincingly worked out processes of change as such a 'figure' (cf. Schütze, 1984, p. 92).

[3] *Tristes Tropiques* (1955) is what Claude Lévi-Strauss calls his famous ethnological travelogue, which goes back to a research trip with his former wife Dina Dreyfus to the indigenous peoples of Brazil taking place as early as 1935-38. Lévi-Strauss uses the publication (in which he only once mentions Dina Dreyfus, who has great credit for the research results) to propagate his structuralist anthropology: 'The totality of the customs of a people is always characterised by a style. They form systems. I am convinced that the number of systems is limited and that human societies [...] never create something absolutely new, but limit themselves to selecting certain combinations from an ideal repertoire. […] If one were to (create) the inventory of all customs […] , one would eventually get a kind of periodic table similar to that of the chemical elements, in which all real and also possible customs would be grouped into families, so that one only has to find out, which of them the individual societies actually accepted.' (Lévi-Strauss, 1978, pp. 168-169; *translation by the author*). Not surprisingly, Bourdieu finds this kind of structuralism 'ahistorical'.

[4] It is about the surprising discovery of the frequent celibacy of male firstborns in farming families, whose symbolic value on the (national) marriage market has deteriorated dramatically in the 20th century (cf. Bourdieu, 2008).

[5] In the original tone of the interview on the occasion of Bourdieu's 90th birthday with *Jungle World*, from which the text comes, Schultheis continues – with a critical view to Germany: 'It's amazing how late people discovered [Ernaux] in the German-speaking world […] In the 1980s, when Bourdieu's and Ernaux's social analyses were part of the standard repertoire of intellectual life in France, mainstream German sociology celebrated the end of class society and the elevator to the top for all. Now, almost four decades later, in the face of growing social inequality in access to all forms of life chances, people seem to be reconsidering and rediscovering the gravity of social reproduction.' (Schultheis 2020, p. 13; *translation by the author*)

[6] For the programme title *'Adieux au prolétariat. Au delà du socialisme'* (Paris 1980: Galilée), the unorthodox left-wing journalist André Gorz was still heavily attacked, at least by the orthodox left.

[7] This becomes clear when one compares *The Years* with the great 'Copenhagen Trilogy' by the Danish writer *Tove Ditlevsen* (1967/2021a, 1967/2021b, 1971/2021c). She also comes from the working-class milieu, but was born in 1917 and has no academic training. The three autofictional volumes *'Childhood'*, *'Youth'* and *'Dependency'* convince with a language that is as simple as it is incredibly precise and the vividly comprehensible description of her world, but they do not show the self-reflexivity that is so characteristic of Ernaux's works.

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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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