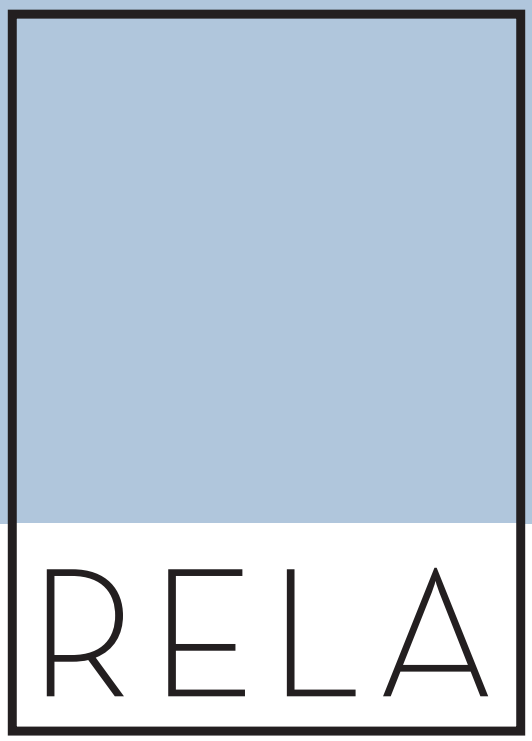
Inclusion, adult education and social justice



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Policies and practices of inclusion in diverse fields in society have received increasing attention in recent years. Initially, the notion of inclusion was almost exclusively related to the (enhancement) of participation of disabled persons through educational initiatives. In recent decades however, the focus of inclusion policies and practices has systematically broadened, encompassing individuals and groups that are deemed to be in high risk of vulnerability or marginalization, such as persons living under the conditions of migration, unemployment, disability, insufficient literacy skills, disadvantaged communities or poverty, etc. The term social inclusion:

> has become a broad spectrum policy organizing and action concept that encompasses all forms of social exclusion and marginalization with a strong poverty-reduction and youth-unemployment focus (Peters & Besley, 2014, p. 108).

This widening of scope has been enhanced by the growing interest of international organizations such as UNESCO, OECD, the World Bank and the European Union, but also national governments, that have increasingly become worried about the persistent exclusion of large numbers of individuals and groups from diverse societal domains both in the Global North and South. Policies initially had mainly a welfare character. Later these policies were also enlarging their scope and have fostered a broader understanding of inclusion. In line with this, inclusion has now become part of the discourse of policies and practices such as education, social work, employment, sports and recreation, politics and even in the world of banking fostering 'digital inclusion'. It is connected to discourses on lifelong learning, social cohesion and integration, activation, widening participation, equality/equity, democracy and social justice. Initiatives of inclusion are often a response to processes of social exclusion that can be described as a rupturing of social bonds, which is:

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> a process of declining participation, access, and solidarity. At the societal level, it reflects inadequate social cohesion or integration. At the individual level, it refers to the incapacity to participate in normatively expected social activities and to build meaningful social relations (Silver, 2007, p. 4419).

The increased concern for social inclusion also relates to the rise in Europe and beyond of extremist political parties taking advantage of the discontent of large groups of people who feel excluded from mainstream society.

Adult education has over the last decades been very active in this domain, since one of its major goals is to combat social exclusion and to support the participation of vulnerable individuals and groups in society. It has often done so from a strong social justice perspective, while understanding exclusion/inclusion in accordance with societal transformations causing deprivation and marginalization. Such approach to inclusion is not neutral, since it is based on a normative, predominantly humanistic, view on desired societal conditions (Schreiber-Barsch, 2018). In line with this, diverse strategies have been developed to combat social exclusion through literacy education, language learning, workplace learning, integration courses for migrants, second chance learning, open universities, community education, employability initiatives, social work practices, teacher training, online learning and blended learning. These practices have been framed with the help of theoretical concepts and research methodologies such as validation of prior learning, biographical learning, inclusive learning spaces, participatory (action) research, transformative learning and critical pedagogy (Morrow & Torres, 1995).

There is a very rich literature on (social) inclusion in various disciplines of social research such as sociology, political sciences, psychology, law, pedagogy, and anthropology. With this thematic issue, the European Journal for Research on the Learning and Education of Adults (RELA) contributes to the furthering of insights regarding the connection between adult education and social inclusion with a special focus on equality, equity and social justice. Social justice thinking in adult education has predominantly been inspired by humanistic discourses. More critical positions in adult education research have referred to the intersectionality of exclusionary mechanisms such as race, gender, class, age and disability and how this has impacted on the experiences of adult learners (Merrill & Fejes, 2019). In recent times this basic inspiration is also being complemented by post-humanist, new materialist and indigenous discourses, claiming the inclusion of non-human actors in reflections and practices of education (Goodwin & Proctor, 2019, Lange, 2023).

In this thematic issue we now present an interesting selection of contributions that cover a varied range of both theoretical and empirical reflections on the connection between inclusion/exclusion and practices of adult education.

The first article on *The Paradox of Exclusion through Inclusion* by Danny Wildemeersch and George Koulaouzides analyzes the general discussion on inclusion in education that had its origins in educational reform movements and in special needs education policies and practices. They further go into the growing interest in international organizations, resulting into varied attempts on national and local levels to create equal opportunities for all, with particular attention for students with special needs. These concrete policies and practices of inclusive education often coalesced with deficit approaches, resulting into the paradoxical situation that attempts to include often had opposite effects. Inclusive practices may indeed reinforce existing dependencies rather than reducing them. In a final section the authors analyze, through a literature study, how adult education practices and research deal with this paradox of exclusion through inclusion.

The second article by Patricia Gouthro and Susan Holloway, titled *Critical social theory, inclusion, and a pedagogy of hope: Considering the future of adult education and lifelong learning*, discusses how critical social theory informs adult education teaching and learning to develop lifelong learning policies with concerns for inclusion, social justice and equity. Based on the analysis of work developed by several scholars, such as Freire, Mezirow and Jarvis, among others, this article debates the role of pedagogy in the promotion of inclusion and equitable circumstances for adult learners. It also stresses the relevance of discussing power relations in the shaping of learning contexts. It argues too how research has emphasized the role of neoliberalism in co-opting different institutional discourses to its benefit. The article finishes with a plea for research focussing on hope and social purpose in adult education teaching and learning.

In the third article *Citizenship, learning and social inclusion* Viktor Vesterberg interrogates a EU-funded welfare project in Sweden targeting poor EU migrants. He focuses on the ways those engaged in these projects construe the concept of social inclusion. Drawing on the work of Michel Foucault, analyzing interviews with key staff involved in the project, he identifies the ways the target groups for the project are constructed, problematized and governed as learners that are not yet socially included in society and the labour market. The analysis shows further how EU policies on social inclusion, with a strong emphasis on employability, clash with dominant political discourses in Sweden and the regulations of the Swedish ESF council. The latter aspects rather hinder the work enhancing the employability of vulnerable groups. The author argues for further research that takes the perspective of those who are the target of these kinds of interventions.

In the fourth article titled *Social exclusion in public policies and the micropolitics of an association funded by migrants*, by Carmen Cavaco, Catarina Paulos, Rita Domingos and Emília Alves, the reader is presented a critical discussion on the complexity of social exclusion. The article is based on two main topics: public policy discourse on social exclusion in programs under development; and adult education activities implemented by a non-governmental organisation founded by migrants, based on valuing of experience, knowledge and the work in tandem of adult educators. Interpretation of data collected through participatory research stresses paradoxes to be found between public policies discourses on the one hand and on the other hand the way people, participating in experiential adult education courses in a specific area of a Portuguese town located in the periphery of Lisbon, understand their neighbourhood, as a space of struggle and social exclusion.

In the fifth article *Towards a Post-Humanist Design for Educational Inclusion* by Viktor Swillens, Mathias Decuypere, Joke Vandenabeele and Joris Vlieghe, the authors discuss how an inclusive pedagogy can foster a more just way of inhabiting litter polluted living environments, in which the interests of both human and non-human dwellers are taken into consideration. They theorize how arts can function as study material and enable a collective sensitivity for the ways in which (non-)human entities (e.g., fishermen, seals, birds, litter pickers, tourists, plastic producers) constitute a 'sick' habitat. Based upon a theory-driven participatory action research with adult inhabitants of the litter polluted Belgian coast, they conclude that a study pedagogy has the power to constitute collective events of emancipation in which inhabitants of damaged living environments can start to inhabit these places.

In the sixth article *Teachers' approaches to teaching for social inclusion in second language education for adult migrants* Helena Colliander and Sofia Nordmark focus on how teachers in these practices conceptualize and enact teaching for social inclusion. They draw on interviews and observations conducted with eight teachers. The findings

demonstrate the teachers' concepts and practices of fostering social inclusion are based on their perceptions of the students and their requirements for inclusion. Teachers emphasize the importance of the development of language skills for both formal qualifications and everyday life, in addition to imparting knowledge about civics and societal norms necessary for integration into Swedish society. They conclude by arguing that qualification and socialization are the main aims of teaching rather than subjectification. Social inclusion thus implies students' responsibility to change.

In the seventh article by Jakob Bickeböller titled *Special offers for target groups that otherwise would not have been reached*, the author focuses on regional networks in literacy and basic adult education in Germany. Drawing on the perspective of neo-institutionalism and institutional logics, Bickeböller has set up case-studies in two regions in Germany aimed at identifying the impact of different community logics on the participation in basic education practices. Data in the two regions are gathered through interviews with experts. A key finding is how the affiliation-based community legitimizes itself through a shared belief in a unifying value. The members support each other and foster a sense of belonging.

In the final article *Adult Education and belonging: a view from Ecuador* Alexis Oviedo and Karem Roitman argue that access to education is a matter of individual and communal justice and development. However, simple inclusion often fails to capture the structures of power and inequality that limit the potential of education. It is not enough to *be* in education, we must aim for an education that adult students can *belong* to. This requires a re-conceptualization of belonging as complex, non-binary, and multifaceted, acknowledging the struggles of adult students to participate in education. For this, the authors call upon theories of liminal belonging, in particular Anzaldúa's idea of mestiza consciousness. In connection with a case-study in Ecuador with adult students, they reflect on the gender and identity struggles to belong and conclude with some recommendations on how pedagogy and institutions can be adapted to foment belonging for adult learners.

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The paradox of exclusion through inclusion: Interpreting inclusion from a critical pedagogical perspective

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Abstract

In our contribution we investigate firstly the general discussion on inclusion in education that had its origins in educational reform movements and in special needs education policies and practices. In line with this, we describe the growing interest in international organizations, resulting into varied attempts on national and local levels to create equal opportunities for all, with particular attention for students with special needs. We furthermore analyse how these concrete policies and practices of inclusive education often coalesced with deficit approaches, resulting into the above-mentioned paradox of exclusion through inclusion. In a next step, we explore how and why inclusive practices keep on reinforcing existing dependencies and possible ways out of the dilemma. In a final section we analyse how in adult education research literature, this paradox of exclusion through inclusion is dealt with and what answers are developed in this particular field of research.

Keywords: inclusion and exclusion, special needs, inclusion policies, adult education, critical pedagogy

Introduction

Inclusion is the new buzzword in policy initiatives related to economic, social and cultural settings in many countries in the Global North and South. In these contexts, inclusion means that maximum efforts should be done to give both children and adults, particularly the ones who live in precarious conditions, a proper place in society through initiatives of

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education, social work, health services, workfare initiatives, etc. Public authorities invite practitioners of different social professions to make 'inclusion' a central target of their practice. The spread of this new buzzword and its related practices requires some critical observations. It is quite remarkable or even paradoxical that the emphasis on inclusion, particularly by policy makers, occurs in times when diverse forms of exclusion are undeniable. Is 'inclusion' more than 'a feel-good rhetoric' (Armstrong et al., 2011)? In our presentation we will argue for a nuanced, yet critical and contextualized interpretation of the concept, its policies, and its practices.

The concept of inclusion was, from the beginning, strongly associated with the support of disabled people to integrate better into mainstream society. Gradually, however, it obtained a broader meaning, particularly in policy contexts. Already in the seventies the French sociologist René Lenoir suggested that there were many other categories in need of inclusion in his seminal work 'Les Exclus' (Lenoir, 1976). From the eighties onwards the notion of inclusion encompassed initiatives in diverse fields of policy intervention such as education, social welfare, employment, poverty reduction, with a special focus on marginalized groups. In response to these developments, various authors argue that the broadening of the policy concept should be understood in connection with the increasing neo-liberal tendencies in the globalized world (Armstrong et al., 2011; Tomlinson, 2012; Slee, 2013, 2014; Peters & Besley, 2014; Nguyen, 2019). In response to this, they emphasize that concepts and practices of inclusion should also reflect aspects of democracy and justice, implying that everybody has equal rights and obligations and can fully participate in social life.

In our contribution we investigate firstly the general discussion on inclusion in education that had its origins in educational reform movements and in special needs education policies and practices. In line with this, we describe the growing interest in international organizations, resulting into varied attempts on national and local levels to create equal opportunities for all, with particular attention for students with special needs. We furthermore analyse how these concrete policies and practices of inclusive education often coalesced with deficit approaches, resulting into the above-mentioned paradox of exclusion through inclusion. In a next step, we explore how and why inclusive practices keep on reinforcing existing dependencies, including how philosophers like Jacques Rancière and Hannah Arendt interpret this phenomenon and show ways out of the dilemmas. In a final section we analyse how in adult education research literature, this paradox of exclusion through inclusion is commented and what answers are developed in this particular field of research. We realize that our investigations are limited to how inclusion is mainly understood in the western world and that the concept and practices of inclusion in the Global South could be interpreted differently. However, our literature search did not reveal important contributions in this regard, apart from the already mentioned Nguyen (2019). We assume that the 'western' understanding of inclusion is being proliferated under the influence of international organizations and globalization dynamics. It would, however, be interesting and a challenge to research in a comparative way the different interpretations of inclusion around the world.

The origins of inclusive education

Inclusive education has a long history, already going back to the reform pedagogies of the first half of the 20th century. John Dewey, the famous American philosopher, and educational reformist was, together with his wife engaged with the problem of the exclusion of disabled persons from regular schooling practices. They experienced how their own adopted and disabled son was, at different occasions, excluded from several

schools (Danforth, 2019). This experience turned the couple into early activists of inclusive education. In spite of this personal experience, inclusion of disabled persons was not an immediate matter of concern in Dewey's writings. He rather framed this problematic in a broader understanding of democratic education and equal opportunities. In his view schools should be places where all participants are considered equal, in spite of their many differences.

The reform movement in education again gained prominence in the sixties and the seventies of the previous century. Teachers, parents, students and school directors experimented with new forms of school practices, while paying attention to the inclusion of different categories of persons who, for various reasons, could not fully participate in mainstream education (Armstrong et al., 2011). In adult education, the 'discovery' of important groups of (functional) illiterate persons both in the North and the Global South, prompted the development of diverse practices of adult literacy education, which at a later stage became formalized in policies and practices of adult basic education. This broad reform movement was inspired by various critiques of the exclusionary character of mainstream education and by attempts to democratize educational institutions.

Around the same time, initiatives of inclusive education were increasingly associated with the domain of special needs education. From the fifties and the sixties onwards this domain of educational research and practice operated on the basis of diagnosed deficits and 'within-child' explanations (Schuelka et al., 2019). Sophisticated measuring instruments were developed, often with a medical psychological bias, to diagnose these deficits that supposedly made it hard for individuals to participate in regular schooling and society. In line with this, individuals who were diagnosed as deficient, were relegated to special education institutions that were expected to remediate the differences and deficits on a scientific basis. Hence, special education in those days increasingly isolated individuals with special needs in segregated institutions. In addition, Slee (2013) observed that:

> In an astonishingly short period of time, inclusive education has firmly planted itself in education and public discourse. Libraries and bookshops have dedicated shelves to this genre. Education jurisdictions around the world have adopted the vocabulary of inclusive education […] and invested significant resources into the production of policy texts, the development and renewal of capital and human infrastructure, and modified curriculum programmes to make schools and higher education more inclusive. (Slee, 2013, p. 896)

Today, inclusion is indeed a key term in policy documents and recommendations produced by international organizations such as UNICEF, UNESCO, OECD, ILO, the World Bank, the European Union and CEDEFOP. While the term originally referred to the inclusion of students with special needs in educational processes (UNICEF, 2014), it has gradually acquired a broader meaning and is now used to emphasize the need to include all marginalized social groups in educational structures. We see this broadening in two important texts. Firstly, in the UNESCO Global Education Monitoring Report (2020) where it is stated that the term inclusion refers to:

> [...] actions and practices that embrace diversity and build a sense of belonging, rooted in the belief that every person has value and potential and should be respected. Yet inclusion is also a state of affairs, a result, whose multifaceted nature makes it difficult to pin down (p. 11).

A similar approach to this issue can be found in the official texts of the European Union. A recent European Commission document on blended learning states that inclusive education systems are those in which '[...] all learners of any age are provided with

meaningful, high-quality educational opportunities in their local community, alongside their friends and peers.' (European Commission, 2023, p.7). Furthermore, the World Bank also refers to the term inclusion in a broader sense, while acknowledging the difficulty in implementing inclusion policies:

> Inclusive education is a process that requires a profound cultural shift to attain one education system for all learners with the provision of supports inclusive of all marginalized and/or vulnerable groups. The process towards more inclusive education systems cannot happen overnight. (World Bank, 2022, p.2).

In particular policy texts, there is also a strong connection between inclusion and the workplace. In this sense the International Labour Organization (ILO) argues that even though 'an enterprise may be successful in attracting and recruiting a diverse workforce, it is inclusion that influences equality of outcomes, that is, the extent to which diverse members of the workforce are retained, able to thrive and fully contribute' (ILO, 2022, p. 88). And CEDEFOP, whose work influenced the European Commission's tendency to equate adult learning with the acquisition of vocational skills, states that modern initial vocational training programs, and in particular apprenticeships, have the potential to facilitate and enhance the '[…] progress towards the green transformation by shaping skills for workers, learners, and citizens, support the inclusion of vulnerable groups in the labor market, strengthen gender balance in the employment of key "green" sectors and trigger employer innovativeness' (CEDEFOP, 2022, p. 25).

Increasing skepticism

In spite of these positive signals coming from international organizations, the reality on the ground was much more complicated. Various authors became increasingly skeptical about concrete special education practices and policies, particularly for their strong 'deficit' orientation and the lack of awareness among policy makers and practitioners of how the political context strongly influenced the way inclusive education was being developed (Tomlinson, 2012; Peters & Besley, 2014; Simons & Masschelein, 2014; Portelli & Koneeny, 2018; Schuelka et al., 2019; Thomas & Macnab, 2019; Nguyen, 2019; Done & Andrews, 2020; Spandagou, 2021). They all observed that inclusion practices often failed because they are implemented in neo-liberal times which continually create new forms of exclusion and situate the solution of the problem in the individual rather than in the community or the social policies. Tomlinson for example states:

> In the current global recession governments find it easier to focus on individual deficiencies and the removal of welfare payments rather than more costly strategies of reorganizing educational institutions to support all young people in their preparation for adulthood. (Tomlinson, 2012, p. 283)

Strategies that neglect these contextual dynamics are often doomed to fail. In line with such observations, it matters to consider issues of exclusion also from a broader political and societal perspective. In recent decades, societies on a global scale have increasingly created distinct categories of 'winners' and 'losers', both on an individual and collective level. The winners feel comfortable in their cosmopolitan condition. This often coincides with the stigmatization of the losers (the deplorables in the words of Hillary Clinton) who in their turn then respond with hatred vis-à-vis the middle and upper classes, including renunciation or rejection of democratic values and institutions. Education often plays a

role as a selection machinery rather than creating equal opportunities. It is important that educators remain critically aware of how these dynamics operate in view of developing realistic, inclusive responses. The Harvard sociologist of recognition, Michèle Lamont reminds us of Wright Mills' (1959) observation of how private troubles are connected to public issues. Hence, it matters for social researchers to raise awareness,

> about how a society that is increasingly organized around the pursuit of socioeconomic success and the achievement of middle-class status is doomed to condemn at least the lower half of the social pyramid to be defined (and worse, to define themselves) as "losers." (Lamont, 2018, p. 433).

In accordance with such observations, Thomas and Macnab (2019) warn for romantic ideas about inclusion. Such ideas, in their view, often obfuscate power dynamics embedded in educational practices. Also Portelli and Koneeny (2018, p. 134) argue that it is important to ask some key questions such as: inclusion of what, who determines why, how and who ought to be included; whose values and norms are reflected; is inclusion the same as equity; to what extent does the practice of inclusion reproduce hegemonic norms in education and society? In their contribution they deconstruct some myths that are habitually linked to policies and practices of inclusion in education such as 'equal opportunities guarantee inclusion', and 'standardization coupled with equality ensures inclusion', or 'democracy implies embracing inclusivity without limits'. Underlying such myths is a 'deficit mentality that privileges certain norms, particularly ones that reflect white, middle-class values, negating variation and refusing to consider contrary perspectives' (p. 139). Furthermore, Sally Tomlinson, who has researched the domain of inclusive education for more than thirty years notices in 2012 how the ongoing individualization tendencies in neo-liberal societies have provoked the irresistible rise of the special education industry (SEN-industry):

> While from the early 20th century educationalists, medical personnel and psychologists all had vested interests in expanding the numbers of those in special education, now whole new professions, including the expanding therapeutic and neuro-science professions and allied technical experts, all have interests in expanding, assessing, diagnosing and treating those regarded as being problematic educationally, socially and economically. (Tomlinson, 2012, pp. 279-280)

Widening the scope

From a 'critical' pedagogical view, the tendency to consider exclusion in terms of individual deficits, to be remediated often with the help of specialized professionals, is not a solution to the problem. Inclusion is a challenge and a responsibility both for the individual and society. In line with this, Thomas and Macnab (2022) invite us to also consider how a social system may enhance exclusion. They refer to the way in which many schools in recent times have further developed into assessment-competition and discipline-driven institutions that prevent, rather than stimulate inclusion. In their words, schools often operate as 'exclusion rooms' under the guise of being 'inclusion rooms'. 'Such Orwellian double-think occurs, of course, because of the conflicting demands of political authority, but also because the models, ideas, vocabulary and instruments used to construe difficulty at school have remained essentially unchanged for over half a century' (Thomas & Macnab, 2022, p. 240).

According to many protagonists of critical pedagogy, the interpretation of exclusion/inclusion needs to be broadened. They thereby often refer to the notion of 'intersectionality', first introduced in the academic debate on racism by Kimberlé

Crenshaw in 1989. Crenshaw's seminal paper 'Demarginalizing the Intersection of Race and Sex' criticized the dominant tendency to reduce the complex phenomenon of deprivation of black Americans in the US to one single cause. In her view, such discourse makes us 'think about subordination as disadvantage occurring along a single categorical axis' (Crenshaw, 1989, p. 140). In this way of thinking, oppression is regarded as disadvantage caused by one specific characteristic, namely race. In line with this, Crenshaw suggests that:

> […] the failure to embrace the complexities of compoundness is not simply a matter of political will, but is also due to the influence of a way of thinking about discrimination which structures politics so that struggles are categorized as single issues. Moreover, this structure imports a descriptive and normative view of society that reinforces the status quo. (Crenshaw, 1989, pp. 166-167)

As an alternative, Crenshaw suggests to consider exclusion as an intersectional phenomenon, whereby different forms of discrimination interact in creating oppression or exclusion. In line with this, critical pedagogy claims that exclusion operates at the *intersection* of different forms of marginalization: race, gender, income, class, level of education, disability, etc., and that strategies of inclusion should encompass different lines of action (Schuelka et al., 2019, p. 4). In addition, Thomas and Macnab (2022) argue that there is more at stake to understand inclusion than learning difficulties or special needs, as often emphasized by practitioners and researchers of special needs education. Following Crenshaw, they emphasize the complex intersection of diverse factors causing exclusion:

> It is only recently, as the focus has shifted to the intersections of a range of personal, social and cultural characteristics – disability, ethnicity, gender, class, income level, care status, and others – that we have begun to appreciate a broader context to the travails that might be encountered by children and young people at school and for the need for community to be cultivated (Thomas & Macnab, 2022, p.230).

As a response to this challenge Portelli and Koneeny (2018) plea to situate efforts for inclusion in a broader perspective of democracy and democratic education. They thereby refer to the work of Gert Biesta (2009). In his reflection on the relationship between democracy and inclusion, he argues that attempts to make democracy more inclusive are undeniably laudable. However, they do not suffice, since such attempts 'are ultimately based upon a colonial conception of democratization, one in which inclusion is seen as a process where those who are already inside include others who are outside' (Biesta, 2009, p. 101). This is a status-quo conception that considers democracy as a state of being that sustains existing hierarchies of power. For Biesta, for an order to be democratic and inclusive, it implies that it has to be continuously reinvented, refined, aligned with new contexts and new publics. We should understand democratic inclusion not in terms of adding more people to the existing order, but rather as a process that necessarily involves the 'transformation of that order in the name of equality' (Biesta, 2009, p. 110). In this regard, it is important to acknowledge the role of social movements that often trigger democratic initiatives from below.

Assuming equality of intelligence

The transformation of the order can, according to Biesta, find inspiration in the work of Jacques Rancière. This French philosopher has indirectly dealt with inclusion in his writings about emancipation. He has repeatedly stressed that emancipation – in a similar

way to inclusion - is an ambivalent, paradoxical term, particularly in educational contexts where empowering the student is an important objective (Rancière, 1991, 2009). He argues that attempts to emancipate students often have counterproductive effects. Rather than liberating them, well-intentioned teachers make students dependent on the knowledge of the 'master'. What is being taught, in Rancière's view, is in the first place the inability of the student to correctly understand what is at stake. In such approach, the pre-condition for emancipation is the acknowledgement of the ignorance or the student. The teacher sets the aim to reduce the gulf separating him/her from the student. However, in doing so, the distance is often recreated. In view of replacing ignorance by knowledge, the teacher must always be one step ahead of the student, thereby installing a new form of ignorance between the student and him/herself (Rancière, 2009). The consequence is that the inequality between the master and the student is continually confirmed and reconfirmed. Rancière calls this the practice of stultification.

In response to his critical appraisal of this paradox of emancipation, Rancière (2009) develops a radical alternative to which he refers in a provocative way as 'the competence of the incompetent', or 'the capacity of anybody at all to judge the relations between individuals and the collective, present and future' (p. 83). He thereby departs from the presupposition of 'equality of intelligence' and sees the same kind of intelligence at work among a wide variety of people, 'from the ignoramus, spelling out signs, to the scientist who constructs hypotheses' (Rancière, 2009, p. 10). The intelligence he refers to is not quantitative, in terms of how much one knows, but qualitative, in the sense of what he calls the 'poetic labour of translation'. In his approach the point of departure is that all human beings dispose of 'an intelligence that translates signs into other signs and proceeds by comparisons and illustrations in order to communicate its intellectual adventures and understand what another intelligence is endeavouring to communicate it' (Rancière, 2009, p. 10). And, coming back to the position of students in schools or spectators in art practices, he claims that they are not the presupposed passive participants but both distant spectators and active interpreters. 'Spectators see, feel and understand something in as much as they compose their own poem, as, in their way, do actors or playwrights, directors, dancers or performers' (Rancière, 2009, p. 13).

In this view, it is important to assume that in education, as well as in arts and in politics all actors are initially capable of engaging intelligibly in one or other way with what is presented in the class, on the scene, or in the domain of politics. They are all potential translators of signs into other signs, of creating linkages between what they see, hear and what is being done. By consequence, equality is not the outcome of the process, but an assumption with which the process begins:

> Equality exists insofar as someone asserts that equality exists. More accurately equality exists to the extent that some subject acts and speaks on the assumption that equality exists. In either case, equality can neither be planned nor accomplished. It can only be practiced and through this practice verified. It is in a way 'incalculable'. (Biesta, 2009, p. 112)

This is the main intuition underpinning Rancière's philosophy: 'there is not, on the one hand 'theory' which explains things and, on the other hand, practice educated by the lessons of theory. There are configurations of sense, knots tying together possible perceptions, interpretations, orientations and movements' (Rancière, 2009 p. 120).

The idea of equality of intelligence is also present in the way Hannah Arendt conceives of education. Morten Timmermann Korsgaard (2016) informs us how Arendt, following Kant, argues that all humans dispose of the faculty of disinterested aesthetic judgement, detached from subjective positions of self-interest. He calls this kind of

judgement a form of enlarged reflectivity to which school-education can contribute in important ways:

> By creating a school where the events and objects of the world are represented to students in a safe, protected and suspended environment, we can create settings where they can practice the arts of enlarged thought and judgement in close connection to the world, but critically in a suspended and non-productive way, in which they can test and develop their abilities without having to face the responsibility that comes with political existence in the adult world. (Timmermann Korsgaard, 2016, p. 942)

However, the current instrumental pressures on schools, coming from the outside world often have neither space nor time for such kind of enlarged, critical thinking. Nowadays school education is expected to solve various difficult problems society copes with. As an alternative, schools could be places that disconnect themselves to a certain extent from the urgent pressures of the outside world. Studying the world means, in Arendt's view, to learn about 'that what is strange to us' or to learn about the plurality of life. In a paradoxical way, in order to learn about that world, the education should take place 'in a state and a place that is, in a sense, separate from the world, that is, in a state of suspension' (Timmermann Korsgaard, 2016, p. 937).

Timmermann Korsgaard thereby refers to the ideas of Masschelein and Simons (2013), who suggest to free schools from 'productive time' or to take them out of the mode of production. In their words, the school should be the time and the space where students can let go of all kinds of sociological, economic, familial and culture-related rules and expectations. In their view, making school is about suspending the weight of these rules:

> A suspension, for instance, of the rules that dictate or explain why someone – and his or her whole family or group – falls on a certain rung of the social ladder. Or of the rule that says that children from housing projects or from other environments have no interest in mathematics or that students in vocational education are put off by painting, or that sons of industrialists would rather not study cooking. (Masschelein & Simons, 2013, p. 35)

Freeing schools from productive time in this sense means to interrupt educational practices from the instrumental pressures of society, while creating opportunities to study the world, its culture, its traditions, its scientific and technical achievements and so much more in depth and with all senses, so that students are enabled to judge in their own way why and how they want to build their future on the basis of this knowledge, these skills and these values. From the perspective of inclusion and democracy, it also matters to create schools as spaces where plurality and difference can be met, where students learn in very concrete and positive ways how to engage with others that are not like themselves, that may have different cultural, ethnic, linguistic or religious backgrounds, and different abilities to engage with the world.

So far, we have mainly explored what inclusive education for children and youth could mean. The question that remains now is how the matter of inclusion in adult education could be conceived of and what positions researchers in that field have developed in this regard over time. What similarities and differences can be found when adult education policies and practices are compared to policies and practices of school education? Is the paradox of exclusion through inclusion also at play in adult education, and if so, how does it manifest itself? This question will be investigated in the following sections.

What can we learn from adult education?

The term inclusion in adult education research and practice is not a new phenomenon. Its history runs somehow parallel to the history of inclusive education in school-settings. However, it addresses a different public, different settings and different contents. A systematic search of the papers that have been published in the most important journals in the field of adult education and lifelong learning yields texts that discuss the specific term and were published almost four decades ago. An interesting example is the early work of Ilsley (1985) who discusses the inclusion of learners in the process of designing adult literacy programs in order to overcome problems that seem to exclude people from participating in learning activities. Ilsley argues that the participation of deprived adults in the decision-making process and the utilization of their subjective experience in the learning process may enhance the contribution of adult literacy programs to the social inclusion of their participants, since in this way the individual needs of those who participate may be served more precisely. However, Ilsley also acknowledges that a simple focus on individual needs that is not accompanied by a broader recognition and discussion of social values, while it appears to serve inclusion, in fact removes people from their social contexts by promoting an apolitical and value-free learning process that leads to a peculiar form of exclusion. Ilsley's paper is an example of the way inclusion is discussed in this field and one of the first papers we identified, discussing the danger of exclusion through inclusion-oriented initiatives. Nevertheless, as we stated, Ilsley's paper is one of the many that discuss inclusion in adult learning and education. Thus, in order to create a more accurate (though not exhaustive) picture of how inclusion is discussed in adult education we conducted a literature review searching for papers that debate inclusion as a concept, policy, or educational and research practice in some of the most important adult education research journals[1]. In these papers, we observed the following themes regarding inclusion: (a) skills and competence building for vulnerable groups, (b) Questioning the policy rhetoric, (c) pathways of transformation.

Skills and competence building for vulnerable groups

Adult education has in recent decades increasingly moved away from its initial broad social and cultural orientation as expressed in the concept of 'liberal' adult education. From the seventies and eighties of the 20th century onwards policy makers ushered adult education in an instrumental direction, predominantly focusing on the inclusion of vulnerable groups. This went hand in hand with the upcoming discourse of lifelong learning and an orientation on the enhancement of functional skills and competencies. This trend is reflected in a set of papers that are particularly concerned with the inclusion of immigrants and refugees (Andersson & Osman, 2008; Lodigiani & Sarli, 2017; Slade & Dickson, 2021). Moreover, some papers are concerned with other socially vulnerable groups such as unemployed, people with low skills, or older adults (De Greef, Segers & Verté, 2012; De Greef, Verté & Segers, 2012, 2015; Bjursell, 2019). Here inclusion is mainly connected with access to the labour market by the non-privileged adults, either by acquiring new skills or by participating in a learning process that recognizes skills already acquired by participants either empirically or in other (foreign) contexts. De Greef, Verté & Segers (2012, 2015) have produced a series of papers where they examine the contribution of adult education programs to the social inclusion of their participants. The authors claim that the positive perception of the contribution of adult education to the social inclusion of vulnerable groups varies according to the factors that make each group vulnerable (e.g., class, educational level, etc.). When measuring the outcomes of adult

education interventions for these groups, they found that a significant share of the researched population did not experience an increase, but rather a stabilization or even a decrease in social inclusion after participating in an adult learning course. This made the authors argue that participation alone is unlikely to enhance individual inclusiveness. It rather is the ongoing support of participants by adult educators and the wider social environment that will make a positive contribution towards inclusion.

As technology-mediated learning is increasing its share in the adult education field it is of no surprise that inclusion is also discussed as a learning outcome in online settings. Cocquyt et al., (2017) examine inclusion as social participation and social connectedness and evaluate and compare the outcome of online and blended learning courses. In their research it seems that adult learners who participate in blended education environments (i.e., courses that include face-to-face sessions) show more positive perceptions of social inclusion than those who participated in courses that were delivered only with online technologies. This interesting finding challenges the dominant rhetoric which promotes digital education and learning as an inclusion panacea. On the other hand, Lodigiani and Sarli (2017) advocate for the creation of adequate recognition systems that would foster the capitalization of knowledge and competence in order to secure the stable inclusion of vulnerable adults in the labour market. Here the concept of inclusion is mainly developed in the context of human capital theory, and the role of adult education is perceived as a process that ensures the necessary certification that will transform participants into an attractive skilled workforce. However, even in this narrow economistic view of inclusion, the authors acknowledge that the processes of recognition and certification have a risk to become 'invisible instruments of discrimination among different groups of citizens' (Lodigiani & Sarli, 2017, p. 141) since not everyone has the opportunity to participate in these processes.

A similar view is expressed by Andersson and Osman (2008) who in their paper examine how the inclusive practice of recognition of prior learning (RPL) involves elements of control, observation, and scrutiny (technologies of power) that may in the end result in the social exclusion of migrants from the labour market in Sweden, noting that the issue of inclusion and the related processes associated with adult education should not be left to the mercy of the market. Analogous ideas are also expressed in the work of Cooper et al., (2017) who acknowledge that RPL practices although of inclusive intentions, reflect the exclusionary dominant ideologies that create the frame of reference of educational qualifications in every society. Once again, an adult educational practice that intends to promote inclusion may actually lead to the exclusion of those who participate in it. In the same set of papers, we also noted the work of Bjursell (2019) who examines the benefits of participation in adult learning activities for persons that have entered the later stages of their life. Here inclusion is discussed in terms of active participation in the community and the ability to socialize. Finally, in this group of papers the work of Slade and Dickson (2021) discusses the importance of immigrants' acquisition of language skills so as to enable their inclusion in the social context. The interesting notion here is that the authors recognize that social inclusion through language learning is possible mainly if the learning process includes elements of critical pedagogy and transformative learning based on the lived experiences of the participants.

Questioning the policy rhetoric

Various authors reiterate the skepticism about the instrumental orientation of policy makers in view of realizing the inclusion of vulnerable groups (Rockhill, 1996; Edwards et al., 2001; Williams, 2011). Although these papers have a significant time gap, their

point of view is more or less the same when it comes to the ideology and the rhetoric of lifelong learning. Rockhill (1996) points out that the ideology of lifelong learning is masking how adult education provision inescapably privileges the learning of some at the expense of others. Furthermore, she argues that when general notions such as lifelong learning or the learning society do not discuss or consider in-depth the tough and interconnected realities of exclusion (gender, class, sexual orientation), while focusing on the competence building of the individual lifelong learner, then the result is an even deeper inscription of existing inequities. In response to this, Rockhill (1996, p.186) suggests that inclusiveness in adult education is possible only when there is 'an explicit commitment to tackling the dynamics of racism, heterosexism, and ableism' in professional practice and in program design.

In a similar way, Edwards et al., (2001) raise critical questions about policies and the role of lifelong learning in reducing social exclusion. They argue that the promotion of lifelong learning policy as a social inclusion strategy is based on a viewpoint of social order that depends on social assimilation and neglects diversity and difference. In their view, the notions of inclusion and exclusion are binary and as such the overemphasis on lifelong learning for inclusion actually reinforces difference and social exclusion. In a similar way Williams (2011) is critical on policies that consider social exclusion as a result of low aspirations and promote lifelong learning as a 'remedy' for inclusion. She argues that the assumption which considers the socially excluded as persons that suffer from a lack of confidence or low self-esteem distances the discussion from the real material reasons (e.g., financial poverty) that create conditions of exclusion. In her view lifelong learning that incorporates a therapeutic approach may lead to the 'infantilization' of the socially excluded groups 'as their ability to exercise adult freedom and make independent choices about their future is called into question' (Williams, 2011, p. 465).

Pathways of transformation

As an alternative to these policy orientations, several authors suggest pathways of transformation, individual and collective, enhancing the acceptance of cultural identities, the recognition of diverse social frames of reference, the overcoming of race and gender inequalities, while making use of the individual experiences of the participants in inclusionary adult education processes (e.g., Clegg & McNulty, 2002; Clarke & Lewis, 2016; Alston & Hansman, 2020; Fernandes-Osterhold, 2022). Also the issue of gender and inclusion is of diachronic concern in adult education, whereby authors call for a feminist lens in lifelong education (e.g. Rowan, 1997; Gouthro, 2007).

A unique position in these debates for an inclusive pedagogy in adult education we found in the writings of Sheared (1994, 1999) who introduced the concept of polyrhythmic realities. In her writings, that are also concerned with exclusion due to gender and race, she highlights the value of lived experiences. The articulation of lived experiences by participants in the educational process is, in her view, essential for any attempt to recognize, understand, and assess how exclusion works in daily life and in educational activities, but more importantly to enhance equal involvement in the learning processes. According to Sheared (1999), learning activities structured at the intersection of learners' dissimilar, multicultural, non-linear and thus polyrhythmic lived experiences not only have a greater chance of attracting adults learners, but even more they have a greater potential to prevent dropout cases since the interaction of elements such as race, class, gender and historical, sociocultural and political realities in the design of learning activities is offering, to those who are usually excluded from learning processes, the necessary voice that allows them to share power and control in the educational setting.

Hence, for Sheared, the intersectionality of learners' polyrhythmic realities has to play an important part in the education and learning processes of adults.

In several papers attention is also paid to methodologies suitable to research practices of inclusion. Some papers employ qualitative methodologies and more specifically biographical research methods focusing on the individual experience (e.g., Evans, 2014; Salva-Mut et al., 2015). In these papers inclusion/exclusion is related to cultural, linguistic and self-identity terms and adult education is perceived as a pathway to social inclusion while it is again recognized that any inclusive path should accept and celebrate diversity. On the other hand, we also noted a quantitative effort to explore the collective understanding of social inclusion in Europe in relation to the notion of social justice (Boyadjieva & Ilieva-Trichkova 2017). In this paper, through the development of inclusion indexes and a cross-national comparison of statistical data, it is recognized that adult education has limited power to influence educational inequalities. However, the authors argue that in some cases participation in lifelong learning activities may provide for individuals in marginalized positions (e.g., unemployed) an opportunity for inclusion (in the labour market) and thus assist in the development of a more just society.

Our review of adult education research journals, although not exhaustive, highlighted a number of issues that are central in the debates for inclusion in the field of adult education. Firstly, it seems that adult education and lifelong learning (however vague this latter term may be) are considered to have the potential to contribute to mitigating social inequalities caused by exclusionary factors such as gender, race, social class, educational attainment, unemployment, etc. However, it is also clear that participation in adult learning processes is not in itself capable of preventing social exclusion, and that in many cases the learning processes designed to be inclusive actually create new situations for exclusion. Secondly, it seems that the concept of inclusion for the field of adult education is not fully clarified or at least has several interpretations depending on the social group and the causes of its exclusion. In many cases, particularly in the context of lifelong learning rhetoric, inclusion is linked to individual responsibility and employability. In other cases, inclusion is about critically examining social reality and recognizing diversity. It also seems that for a long period of time there are voices that call for an inclusive adult education which recognizes diversity and celebrates different cultural frames of reference and the intersectionality of the factors that lead to exclusion. Social inclusion is an important end for adult education and at the same time it is a vital foundation for the rhetoric of its development. Paraphrasing John Field (2005) we may claim that 'Adult education is important for social inclusion and social inclusion is important for adult education'.

Conclusion

In this contribution we have observed how the concept and practice of 'inclusion' has in recent decades been become omnipresent in different domains such as education, social work, sports, employment and politics. Generally speaking, inclusion is meant to create opportunities for vulnerable or marginalized individuals and groups to participate in society. In our paper we have focused on the discourse of inclusion in different fields of education. Particularly in the field of special needs education inclusion has become an important motive for empowering disabled students. Furthermore, in the domain of adult education increasing attention has been paid to the inclusion of migrants, of unemployed or illiterate people. We have looked at these developments from a critical pedagogical perspective. Such perspective implies that particular practices and policies in the educational domain are viewed in connection with changes in society at large. In line with

this, we have noticed how several researchers, both in the domain of special needs education and adult education, have articulated critical comments on the discourse and practices of inclusion. On the one hand they salute many, particularly bottom-up, initiatives that support vulnerable individuals and groups to acquire a respected position in society. On the other hand, they warn for practices of inclusion with a strong deficit orientation, often having counterproductive effects. Individuals who are considered to be 'in need of special attention' and being treated as a particular category with specialized medical, psychological and educational methods, may feel to be 'set apart'. Difficulties to participate, which individuals experience, in connection with schooling, with employment or with broader social life, are often not due to the failures or disabilities of individuals, but rather the consequence of broader exclusionary mechanisms in society. Many researchers have observed how such exclusionary dynamics have coalesced with the rise of the neo-liberal society: a society that has increasingly become competitive, pushing individuals and groups, who cannot meet the standards of perfection, further into the margins. They even have also noticed that this tendency to focus on the special needs of individuals, rather than considering the exclusionary effects of society at large, has even produced the emergence of an important special needs industry, whereby market mechanisms privilege the ones who can afford specialized support.

In response to this, various authors suggest linking inclusion practices and policies to principles of democracy, whereby existing hierarchies of power are questioned and redistributed. Philosophers such as Jacques Rancière and Hannah Arendt have shown how educational practices can be reinvented and refined in the name of equality. In addition to that, it is suggested that both schooling and adult education be set free from the pressures of productivity, while creating opportunities for students to study the world, its culture, its traditions, its scientific and technical achievements much more in depth and with all senses. From the perspective of inclusion and democracy, it also matters to create places of formal and non-formal education as spaces where students learn in very concrete and positive ways how to engage with others that are not like themselves, that may have different cultural, ethnic, linguistic or religious backgrounds, and different abilities to engage with the world.

Adult education has historically often defended such principles of inclusion, democracy and plurality. In recent times, however, it has been geared by policy makers to obtain a more productive mode, reinterpreting inclusion from a human capital perspective. In accordance, adult education and lifelong learning have increasingly been instrumentalized to support the achievement of economic goals, while giving up its original position of sustaining free, critical, and convivial spaces of learning. Research has shown that, also in adult education, the paradox of exclusion through inclusion is a real challenge. Also in this field, it is not easy to include individuals and groups from the margins of society in its practices. However, focusing exclusively on remediating individual deficits of adults in order to include them in society will not be of much help either. In this paper various scholars have, as an alternative, suggested to concentrate on the intersection of different forms of discrimination such as race, class, gender, ageism, etc. Such approach will require spaces of education and learning that not only enhance the development of instrumental skills and knowledge, but predominantly understand inclusion as the creation of space and time to explore lived experiences of exclusion and to jointly develop capacities to overcome different forms of discrimination. Such democratic practice requires educational settings where new and unexpected forms of emancipation can be experimented in conditions of equality, openness and respect. In order to achieve this, adult education practice and research will need to continue its resistance against increased instrumental and productivist policy orientations. It should

avoid being entangled in a 'single story' (Addey, 2018), reducing participants to individuals in need of help to secure their pathway to 'normality' as citizens or workers. Our analysis in this paper has shown that such approaches are often contra-productive and undemocratic. The analysis has also shown that the strength of emancipatory adult education is often related to its capacity to create places and practices where participants can experience their own capabilities and where they can exchange these experiences in view of making informed choices on how to (re)direct their lives.

Notes

1 For reasons related to access and time constraints we searched for inclusion-related papers in the following journals: European Journal for Research on the Education and Learning of Adults, International Journal of Lifelong Education, Adult Education Quarterly, New Directions for Adult and Continuing Education, Studies in Continuing Education, Journal of Adult and Continuing Education and Journal of Transformative Education.

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Critical social theory, inclusion, and a pedagogy of hope: Considering the future of adult education and lifelong learning

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Abstract

In recent years, issues of inclusion within the field of adult education have garnered increasing attention and have expanded to consider various equity and social justice concerns. Frequently, however, these concerns are considered in a piecemeal fashion, either with a narrower focus on a particular equity issue, or as a simplified add-on to wider debates about educational design, delivery modes, or policy structures. To deepen the discussion around inclusion in lifelong learning, it is important to draw upon critical social theory to explore not only particular circumstances and challenges faced by different groups seeking equity and inclusion, but also to consider the broader frameworks in which adult teaching and learning happens. Despite challenges such as neoliberalism, adult educators need to retain Freire's belief in the possibilities offered by a pedagogy of hope and the belief that humans have the capacity to make positive changes.

Keywords: inclusion, critical social theory, adult education, pedagogy of hope, multiliteracies

Introduction

In recent years, issues of inclusion within the field of adult education have garnered increasing attention. At the same, the parameters for what constitutes inclusion issues have expanded to consider various equity and social justice concerns. Frequently,

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however, these concerns are considered in a piecemeal fashion, either with a narrower focus on a particular equity issue, or as a simplified add-on to wider debates about educational design, delivery modes, or policy structures. In this paper we argue that to deepen the discussion around inclusion in lifelong learning, it is important to draw upon critical social theory to explore not only particular circumstances and challenges faced by different groups seeking equity and inclusion, but also to consider how theory may inform the broader frameworks in which adult teaching and learning happens.

We situate this discussion by drawing attention to the importance of Paulo Freire's work on generating a pedagogy of hope. Freire (1992/2004) argues that 'hope is an ontological need' (p. 2). The last few years have felt like an uneasy shift to a darker time, with right-wing populism taking root, wars and conflicts on the rise, and inequalities related to gender, sexuality, ability, race, and culture laid bare against the backdrop of a global pandemic and drastic climate change. Despite these challenges, it is important for adult educators to retain hope and believe that human beings have the capacity to make positive changes. Critical social theory offers a rich resource that educators can draw upon to make sense of their work and inform their teaching as they strive to create a more socially just and inclusive society.

The paper begins with a short overview on topics of inclusion and then summarizes some key contributions of critical social theory to the field of adult education/lifelong learning. It considers the impact of a neoliberal climate that shapes policies and pedagogies which constrain a more critical analysis of fundamental democratic ideals of social justice and equity that should inform debates about inclusion. The discussion builds on the critical social theory of Paulo Freire, who argues for a pedagogy of hope, and considers the UNESCO Sustainable Development Goals, which include a commitment to lifelong learning for all. The paper concludes with a couple of exemplars from the field and from our own research on multiliteracies to illustrate how critical social theory can inform discourses of inclusion in the field of adult education.

Inclusion issues

As the Call for Papers for this special edition note, the focus on inclusion has expanded in recent decades to encapsulate conversations about a range of different topics. It is clear that 'the concept of social inclusion is a multidimensional one' (de Greef et al., 2015, p. 63). Although the Call argues that 'social justice thinking in adult education has predominantly been inspired by humanistic discourses', we would argue that particularly in the North American context, it has been informed by critical theory, which is often rooted in claims for more radical societal change. In recent years, equity-seeking groups and allies have become more vocal in asserting the need to address certain inclusion issues in adult education, particularly in Canada and the United States. Inclusion issues for sexual minorities have been explored in various contexts such as community-based learning (Grace & Wells, 2007; McAlister, 2018), organizational settings (Hill, 2006), and international development and relief work (Mizzi, 2014). Debates about ontological assumptions have evolved as Indigenous educators challenge Western paradigms of knowledge to include alternative frameworks for learning (Battiste, 2013; Weber-Pillwax, 2021) and within higher education contexts in Canada there is a shift to 'Indigenize the Academy'. Adult education researchers explore ongoing challenges of inclusion for many racialized groups (Alfred, 2015), such as African-Americans, ranging from basic literacies that inform health outcomes (Hill & Holland, 2021), to opaque and inequitable assessment practices for Black faculty members in higher education (Gnanadass et al., 2022). Within Canada and the US, discourses about inclusion often

focus on concerns regarding racism, racialization, and white supremacism (Battiste, 2013; Brookfield et al., 2019; Brookfield & Hess, 2021; Carpenter & Mojab, 2011).

In this time of global migration and refugee crises, both European and North American educators explore how inclusion issues arise for migrants in workplace participation (Liu & Guo, 2021), citizenship (Fejes, 2019; Kloubert & Dickerhoff, 2020) and higher education (Webb et al., 2021). The sheer number of migrants and rapid pace of migration has greatly increased in recent years (Morrice, 2019;European Parliament, 2017). Inclusion issues for adult migrants is further complicated by low levels of digital literacies (Wångdah et al., 2014). Greater success with minoritized migrants in developing additional language skills and fostering literacy is seen in studies whereby migrants' transnational knowledge is valued (García-Barroso & Fonseca-Mora, 2023); connected literacies via social media are recognized (D'Agostino & Mocciaro, 2021) and migrants' sense of belonging is prioritized (Intke-Hernández, 2021).

Age is another factor of inclusion, whether it regards unemployed youth (Warner Weil et al., 2016) or the elderly who fall into the category of being 'socially excluded' (Kulmus, 2021). Research also explores opportunities for learning engagement amongst older citizens through programs such as those offered by folk schools (Hedegaard & Hugo, 2020) or through an assessment of their social, civic, and political participation within the broader society (Alves Martins et al., 2022). The needs of learners with disabilities raise important issues of inclusion in community-based contexts (Hall, 2017) and are increasingly taken up in the post-secondary sector (Lopez-Gavira et al., 2021).

As the areas for research around inclusion in adult education continue to expand, tensions arise as the complexity of these issues becomes more evident. Entigar (2021) states that 'the term 'inclusion' has become something of an aggregate concept, which likely accounts for how it is expressed as a universal good in education' (p. 836). Most educators aspire to be inclusive in their teaching practices, but debates arise about what this entails when selecting pedagogical approaches, generating policies, or integrating various kinds of curricular strategies, assessment processes, and program designs. The development of critical social theories to explain inequality sometimes seems fragmented, with its increased focus on various identity issues. Conflict may emerge between competing interest groups regarding which issues need to be prioritized. In a neoliberal society, the values of the marketplace, competition, and a rhetoric of individual choice often inform policy-making decisions and educational program design (Eynon, 2021; Mikelatou & Arvantis, 2018; Schöni, 2022). This climate of individualization and competition may undermine more collective endeavours to work towards an ideal of 'the common good' (Boyadjieva & Ilieva-Trichkova, 2018) or the 'just society' (Brookfield & Holst, 2011; Welton, 2005).

It is challenging to address adequately all the expectations raised to fulfil to the goals of inclusion. For adult educators and educational institutions, there are pressures to maintain academic quality and standards, and balance competing demands on limited resources and time, while providing a supportive and inclusive learning environment. Given the complexity of navigating decision-making processes related to inclusion, considering the larger framework and evolution of critical social theory may help advance and centre scholarly conversations about the purpose and intent of adult education and lifelong learning. In this next section we briefly overview the range of critical social theory that adult educators can draw upon to inform their teaching practices and to develop lifelong learning policies in light of concerns regarding inclusion, social justice, and equity issues.

Critical social theory

Over the years, a wide gamut of theories has informed educational research. Drawing on the work of a Dutch professor, Ten Have, Boeren (2016) argues that adult education can be seen to be a 'first floor' field of study, in that it has built its theoretical discourses on the foundational work of other 'ground floor disciplines' such as sociology, psychology, and philosophy. Within the realm of adult education and lifelong learning, many researchers and scholars draw upon the work of theorists from different academic disciplines such as these, as well as more recently developed interdisciplinary fields such as Women's Studies or Cultural Studies.

We use the term 'critical social theory' to look at scholars whose theory is informed by more of a critical lens that acknowledges the impact of broader social, cultural, and economic structures in shaping learning experiences. Although some adult education scholars would situate critical social theory only in the realm of radical scholarship (Collard & Law, 1991), we argue critical social theory exists across a spectrum and is informed by a consideration of how societal variables impact upon different learning contexts and thus on adult learners' experiences. In adult education, the development of critical social theory is linked to its historical roots of programs and educators informed by a social purpose orientation, such as Miles Horton and his work at Highlander or Gruntvig's folk schools (Connolly & Finnegan, 2016). We argue that the realm of critical social theory ranges from the work of less political (but very influential) scholars such as Jack Mezirow (1997) and Peter Jarvis (1995), who emphasize the importance of critical reflection for learning, to thinkers who argue for more radical social transformation, such as Shahrzad Mojab (2015) or John Holst (2002).

Critical social theory emphasizes social betterment, whether this evolves from individual growth and reflection about one's life and role in society, or a collective engagement in learning through community development, active citizenship, and/or social activism. Earlier critical theoretical work in adult education drew upon the work of Karl Marx, as well as theorists from the Frankfurt School, such as Theodore Adorno and Erich Fromm (Brookfield, 2005). Arguably, the most influential scholar in the field of adult education and lifelong learning has been Jürgen Habermas, a second-generation Frankfurt School scholar, who despite his deeply critical analysis of the evolution of modern society, offers a more hopeful stance than earlier Frankfurt theorists. As Welton (1993) writes, 'Jürgen Habermas's works helps us to think imaginatively about knowledge, learning and the human condition' (p. 81). Through Habermas's (1981; 1987) theory of communicative action, educators can draw upon the critical tradition in adult education to construct an emancipatory perspective. According to White (1988), Habermas believes language has a 'problem-solving capacity for interaction' (p. 35) through which people can make sense of their world and their actions within it. The usage of language offers opportunities for citizens to engage in communicative action, or what Mezirow (1997) has termed as communicative learning. Habermasian analysis has been used by critical adult educators to explore issues of social justice and concerns about democracy and citizenship (Brookfield, 2005; Newman, 1999; Welton, 2005), including scholars who have brought a feminist lens to their analysis to explore gender and other issues of inclusion in greater depth (Hart, 1992; Gouthro, 2009; 2006; 2005). Similarly, feminist scholars Sara Carpenter and Shahrzad Mojab (2011; 2020) have developed a critical framework for exploring adult education using a Marxist feminist approach.

Two well-known male scholars who have had a significant influence shaping discourses in adult education are Jack Mezirow and Peter Jarvis. Throughout his career, Mezirow (1997) wrote extensively to develop a theory of transformative learning that

helps learners 'move toward a frame of reference that is more inclusive, discriminating, self-reflective, and integrative of experience' (p. 5). Transformative learning has been extensively critiqued by researchers and theorists intrigued by how this analysis has been applied (with varying levels of insight) to a broad array of learning contexts (Hoggan et al., 2017; Kruselnicki, 2020; Taylor et al., 2012). The work of Peter Jarvis (2014; 2008; 1995) has also been widely taken up by adult educators, as can be seen in a special double volume edition of *The International Journal of Lifelong Education* (2017) where a variety of scholars paid tribute to extensive impact of Jarvis's work in the field.

Both of these theorists are situated on the less radical end of the spectrum of critical social theory. Much of their analysis focuses on the capacity of human beings to learn to think and reflect more critically. For learners entering adult education classrooms or working in higher education contexts, their theories are often popular, perhaps because they are accessible and focus more on individual growth rather than radical social transformation. It may be that many practitioners are more receptive to analyses that call for greater introspection and personal reflection rather than engagement in activism.

Stephen Brookfield also fits within this category of very influential scholars in adult education. His earlier work encouraged educators to develop the capacity for critical reflection (Brookfield, 1995), but in the last couple of decades his writing has developed a more radical bent as he delved deeper into the realm of critical theory (Brookfield, 2005), and issues of racism and white supremacy (Brookfield, 2019; Brookfield & Hess, 2021).

Postmodernism

Beginning in the late 1990s there was a postmodern turn in adult education, where questions of uncertainty and provisional knowledge were raised by educators influenced by theorists such as Michel Foucault. The 'field' of adult education, replaced by the concept of a 'moorland', was depicted a precarious terrain, characterized by hazy landmarks and a sense of fluidity (Usher et al., 1997).

> In the postmodern, with fixed reference points and solid grounding becoming increasingly detached and shaky, the difficulty becomes something to be accepted rather than regretted; it becomes troublingly pleasurable in opening up possibilities for constituting identities. (Usher et al., 1997, p. 6)

Adult educators were encouraged to lean in to the uncertain. Attaining consensus to work towards shared goals was no longer an educational objective. Instead, attention was paid to the multiplicity of meanings and influences that impact upon lifelong learning, encouraging a critical questioning of taken-for-granted assumptions. Despite this provisional, at times seemingly playful or capricious approach to knowledge construction, educators were cautioned to be aware of the troubling undercurrents of power that infuse all teaching contexts. Whilst welcoming a new array of critical exploration into topics such as sexual orientation, gender and cultural identity, and other inclusion issues, the impact of power was still seen as a salient concern:

> A diversity of meanings, lifestyle choices and identities still has to be seen within a network of power relations; to have difference recognised within the relations of everyday life still involves struggle and contestation against dominance and subordination. (Usher et al., 1997, p. 6).

Some feminist adult educators, such as Tisdell (2000) and English (2006; 2003) also drew on poststructural and postmodern discourses to inform their own analyses of women's learning experiences and feminist approaches to towards teaching, inclusion, and community engagement.

A consistent thread through evolving critical discourses in adult education has been how power impacts on social justice issues although postmodernism and poststructuralism raised doubts about the ability to aim for social consensus. The often fierce debates between postmodernists and traditional critical theorists at the turn of the century reflected concerns that accepting the idea that knowledge was always provisional could result in the loss of collective will to advocate for a path forward, thus generating a sense of unease amongst many critical scholars.

Intersectionality

The concept of intersectionality recognizes interlinking, overlapping categories of identity, that can serve as both characteristics of belonging and points of exclusion, which shape the experiences of many learners. The 'formulation of intersectionality posits that experiences emerge because of the interaction among social categories (race, gender, and class) and their relation to each other' (Kamisli, 2021, p. 105). Kaushnik and Walsch (2018) note a number of key issues are raised by the concept of intersectionality to explore 'interlocking systemic inequalities due to social structures' (p. 29). Intersectionality developed as a response to counter oppression and address social justice concerns, and considers how variables such as race and gender are 'mutually constituted and are not experienced separately' (p. 29). An acknowledgement of intersectionality points to the complex systems of power that exist within societal structures.

While early critical social theory focused primarily on social class, in recent years theoretical debates have expanded in a variety of areas such as feminism, critical race theory, post-colonialism, and Queer theory. Ongoing questions of epistemology and explorations of systemic barriers related to racism, homophobia, sexism, and ableism, all pose challenging issues for educators committed to social justice. These theoretical analyses often bridge into other disciplines within the social sciences, connecting with other professional fields outside of education such as social work or medicine, and examine issues of inclusion in workplaces, homeplaces, higher education, and community-based contexts. Critical social theory is evolving. It illuminates how power permeates discourses and often reveals deep structural incongruencies through ideological critique. Theory deepens and extends the analyses of how social structural factors generate and reinforce inequalities for different groups of adult learners.

The realm of critical social theory is indeed broad. Acknowledging the critical part of education, however, is key because it raises the specter of power, and asks important questions about how societal contexts and social variables permeate and shape adult teaching and learning experiences. This recognition of power can be troubling, as it highlights inequities and inclusion issues. To successfully address issues of inclusion, it is important to consider how neoliberal values shape current educational discourses to gloss over and ignore power differentials and social structural factors that impact on learners differentially.

Neoliberalism

In recent years, critical adult educators have noted the pervasive and detrimental influence of neoliberalism as the 'common sense' of our times (Torres, 2013; Holford, 2016), which has shifted the focus away from education for social purpose. David Harvey (2006) talks about the 'naturalization' of neoliberalism, noting that 'for any system of thought to become hegemonic requires the articulation of fundamental concepts that become so deeply embedded in common-sense understandings that they become taken for granted' (p. 146). With its emphasis on competition and individual choice, regardless of social, cultural, or economic circumstances, neoliberalism articulates a framework for lifelong learning that negates a social justice orientation. Critical social theory has been at the front of offering ideological critique of neoliberalism, and thus challenging its dominant co-opting of liberal language for subversive purposes.

Olssen (2016) draws upon Foucault (2008) to summarize key aspects of neoliberalism which he explains 'has come to represent a positive conception of the state's role in creating the appropriate market by providing the conditions, laws and institutions necessary for its operation' and strives to 'create an individual that is an enterprising and competitive entrepreneur' (p. 130). In this context, individuals are responsible for retraining and reskilling to adapt to changing economic needs. Yet at the same time, as Jackson (2011) points out, 'there remains little recognition that workers (and apparent non-workers) are constructed through gender, social class, 'race', and more' (p. 105). Social structural variables of inequality are screened out of consideration as successfully adapting to the changing demands of the marketplace is deemed to be a personal responsibility. This focus on individualism is presented as offering 'freedom of choice,' yet *exclusion rather than inclusion* through systemic and often invisible barriers means that individuals are left with no voice nor real decision-making power.

Within the European context, this shift to a more technical-instrumental approach to education is evident in recent policy discourses. Antunes (2020) states that 'increased centrality is clearly defined by the perspective that education, training and learning are processes for the acquisition of labour market competences and skills and for the provision of human capital for the economy' (p. 306). Mikelatou and Arvantis (2018) argue that the effect of neoliberalism on lifelong learning discourses is that it 'seeks to organize all policy areas according to the logic of the markets' (p. 500). Because of the focus on employability, citizens 'can rarely engage in civic activities that would influence the political and social developments, which would lead to the creation of an inclusive society that embraces diversity' (p. 501). A narrower policy agenda constrains the work of adult educators and learners who might otherwise be guided by a social purpose tradition that attends to the broader benefits of education as a 'social good'. As the responsibility for provision of adult and higher education learning opportunities shifts from the state to the individual, the values of the marketplace become evident across academic discourses in terms like 'academic CEOs' for leaders in higher education, 'deliverables' for assignments, and notions of 'productivity' assessed by ranked scholarly outputs (Giroux, 2014; Gouthro, 2002). In this context, learners are encouraged to develop a flexible skill set to compete for economic success and the role of the educator is to deliver and then measure whether pre-determined outcomes have been achieved. Such checklists are particularly problematic in addressing concerns such as equity, diversity, and inclusion. Deeper philosophical questions about civic rights and responsibilities, and considerations about inclusive citizenship, democracy, and social justice are relegated to the margins of debate, rather than acting as fundamental guiding concerns for educators.

Recognition, redistribution, and inclusion

To challenge the impact of neoliberalism, critical educators raise questions about underlying value assumptions shaping policies and programs in adult and higher education. Critical social theory draws attention to how adult learning experiences are connected to broader social contexts as well as individual identity. If we look at intercultural capacities when considering how to integrate alternative perspectives, such as, for example, an Indigenous perspective in higher education contexts, we also need to include 'an analysis of systems of power' (Harrison & Clarke, 2022, p. 187). The discourses of critical theory have expanded in recent decades to consider what Nancy Fraser (2003) speaks of as 'recognition' issues, such as identity concerns pertaining to gender, race, sexuality, and differences in ability, along with 'redistribution' issues, such as equity concerns in access, opportunity, and distribution of resources. Guo (2015) explains that Fraser's approach argues that 'change must redress socioeconomic injustice as well as cultural or symbolic injustice' (p. 493). For inclusion to be authentic, there needs to be genuine shifts in policies and programmes that lead to material changes in equitable access to opportunities for socially and historically marginalized groups of adults.

Educational goals, programs and policies are never neutral. They always represent a selection of values, beliefs and ideas that inform decision-making processes regarding curriculum, pedagogy, funding, assessment practices, and program design. Through the processes of critical reflection, which may involve individual transformation of perspectives (Mezirow, 1997; Brookfield, 1995), or through collective learning experiences that may entail greater citizen engagement and social action (Newman, 2006; Ramdeholl, 2019), critical social theory provides insights into how learning occurs within a range of adult education contexts.

Hope as an ontological need

The concept of 'hope' has been explored by various researchers in adult education, many of whom have been influenced by the radical literacy educator, Paulo Freire (Dubin & Prins, 2011; Fenwick, 2006). Fenwick explains that 'educators, through their struggles, continue to hope – for social justice and equality, for active global citizens, for learning that can make a difference' (p. 16). She explores how debates about pedagogies within the field of adult education are advanced at different levels, with various types of focus and intent, critically questioning the premises of alternative approaches to teaching and learning. 'Hope is an ontological need, wrote Freire (1992/2004), that must be *anchored in practice*, that must be historically concrete' (Fenwick, 2006, p. 16).

Freire (1992/2004) explains that to have a pedagogy of hope, there must be an opportunity for people to envision alternatives that could precipitate change:

> Imagination and conjuncture about a different world than the one of oppression, are as necessary to the praxis of historical 'subjects' (agents) in the process of transforming reality as it necessarily belongs to human toil that the worker or artisan first have in his or her head a design, a 'conjuncture', of what he or she is to make (p. 30).

Dubin and Prins (2011) draw upon Freire's work to explore 'the important role imagination plays in conceptualizing hope' (p. 27). Barriers to hope exist when life conditions are overwhelmingly dismal and restrictive, and people lose their ability to imagine anything beyond basic survival. Freire (1992/2004) argues that when one's

personal living conditions are too dire, the possibility of anything better seems impossible to even dream about.

Another dampening effect on hope that Freire (1992/2004) alludes to is when there is a 'bureaucratization' of the mind. The willingness of learners to consider different possibilities is shut off when individuals become habituated to education that is delivered in a narrow, close-minded way, ticking off the boxes by providing the expected responses, rather than thinking deeply or questioning take-for-granted assumptions. Under the influence of neoliberalism, where educational policies are increasingly connected to a scientific understanding which uses a narrow interpretation of what constitutes evidence-based learning, there are mounting expectations for adult educators to adapt a more bureaucratic approach in their teaching practices. 'Educators are under pressure to abandon their vision for a more just and equitable world and to consider themselves technicians whose role is to train individuals to attain predictable, instrumental outcomes' (Atkinson, 2013, p. 6).

Democracy and learning for all

Elfert (2019) provides a sharp assessment of the UNESCO's policies over the decades, critically noting the shift from a more humanistic and inclusive vision to one that aligns with an economic agenda. Although the recent report, *Transforming our world: The 2030 agenda for sustainable development* (2015), articulates lifelong learning for all as Sustainable Development Goal (SDG) 4, she argues that 'if education were truly a human right, it would include all people, especially the poorest and most marginalised. The right to an education means *education for all*' (p. 551). Lifelong learning is not meant to be a privilege for a few select citizens but should rather be supported for all members of all societies. Critical social theory helps to articulate the argument for inclusion as an integral aspect of sustaining democracy amidst a climate of hope.

In his exploration of UNESCO policies and the need to retain this focus for adult education, Stanistreet (2020) argues:

> As most educators will recognize, a sense of hope for the future can be critical in engaging learners, particularly those who are most vulnerable and disadvantaged. The job of education is to offer 'resources of hope' in Raymond Williams' glorious phrase. (p. 6).

Williams' book (1989) [titled with the same phrase] ruminates on concepts such as culture and social class and delves into the importance of theory to help make sense of how societies are structured and how people learn and communicate with one another. He argues that theory not only supports critical analysis, but also 'new seeing', as people are able to imagine alternatives frameworks for living and learning.

Impact of critical social theory on the field

Brookfield (2005) argues that critical theory can help educators articulate a rationale that informs their teaching practices and to argue for curriculum changes and resources to support their work. In this next section we examine two research studies that draw upon different strands of critical social theory to examine the experiences of adult learners from marginalized backgrounds to consider issues of inclusion. We then provide an example of how critical social theory informs our research on multiliteracies using a Freire's work on a pedagogy of hope.

Finnegan et al. (2019) share five case studies of graduates, defined as non-traditional learners, a category that includes individuals 'with disabilities, mature students, and students from working class and particular ethnic backgrounds' (p. 157). They delve into the impact of neoliberal perspectives that shape both government policies and participants' experiences to develop their analysis, which was informed by a critical realist approach that involved working 'between grounded empirical research and systematic theoretical investigation of the socio-historical context' (p. 162). Using this lens to review data involved paying attention to 'sensitizing concepts' – in this case, the idea of *precarity*:

> Following Bourdieu (1998), we [the researchers] use the term precarity to denote the increased level of social vulnerability, insecurity and instability created by the long-term effects of neo-liberal globalisation. (p. 159)

The research team observed that most of the non-traditional students 'assumed a [university] degree would lead to greater security but after graduation experienced a high level of precarity in the labour market' (p. 157). The authors note the prevalent belief amongst both policy-makers and the broader society is that in and of itself, the attainment of higher education should be sufficient to 'enhance career prospects and living conditions of non-traditional graduates' (p. 157). This perspective (aligned with human capital theory) ignores well-documented evidence that education often reinforces and reproduces existing inequities, to assert that 'besides maintaining competitiveness and facilitating individual social mobility it is argued that HE [Higher Education] can *also* overcome longstanding social and educational inequalities' (p. 159). At the same time, with the massification of higher education leading to widespread credentialism and changing work conditions in a post-Fordist society where there are fewer 'good' jobs available, increasingly non-traditional graduates find that a university degree may not lead to the types of careers and lifestyles that they envisioned. Working at jobs that do not pay well, lack benefits, job security, and a clear pathway to advancement, often leads to a sense of anxiety, powerlessness, and a lack of confidence over one's future. Finnegan et al. (2019) note that in a neoliberal context, this failure to attain permanent, well-paid employment is attributed to individual success (or lack thereof) rather than the broader socio-economic conditions, so that 'the 'responsibilised subject' is tasked with resolving social problems and overcoming risks on their own' (p. 160).

Critical social theory makes linkages between individual biographies and broader social structures to highlight existing inequalities and question current educational policies. The authors note that although 'HE was seen as the path to more solid ground and to accrue cultural and social capital' (Finnegan et al., 2019, p. 163) many of the participants became disenchanted with their lack of success. These non-traditional learners, mostly coming from marginalized backgrounds, struggled to retain their hopes and dreams for a better future, harkening back to Elfert's (2019) question of whether current policies in lifelong learning are really designed to be shared by all.

Fejes (2019) draws upon the work of Foucault to point out the shaping of subjectivity and fluid power dynamics in a government funded program using study circles called *Swedish from Day One.* In Sweden, he notes 'much trust has been put into adult education as a means of supporting migrants on the path to "full" citizenship' (p. 235). He draws upon the work of Foucault (1998) to examine how 'power is understood as acting everywhere' (p. 239). Through power, subjectivity emerges, determining whose voices and perspectives will be attended to. Therefore, 'through the discourse of citizenship, power operates and shapes the possible field of action' (p. 239). The goal of the program is to help migrants become 'good' citizens – which are defined as those who participate

in broader society, understand democratic norms and conventions, participate in the labour force, and acquiring fluency in the Swedish language. 'Therefore, the formation of citizens is a question of drawing boundaries, making inclusion and exclusion possible' (p. 239).

Critical questions are raised in Fejes' (2019) analysis about how prioritizing '"the Swedish language" and "knowledge about Swedish society" are positioned as the most important tools for migrants in order to be included in the labour market and society more widely' (p. 241). He argues that this stance diminishes acknowledgement of the language skills that migrants already possess and teaches normative values that contributes to 'homogenising the Swedish social space' (p. 247). The emphasis on existing cultural traditions 'in specific limited ways, *ex*cludes as it *in*cludes" (p. 248). He questions the intent of adult education programs targeting migrants, noting 'the exclusion-inclusion dichotomy is the effect of the exercise of power' – and as Foucault points out, 'power is dangerous' (p. 248). Although the program is intended to benefit migrants, the theoretical analysis raises questions about its design and purpose, and what this means in fulfilling the UNESCO (SDG) 4, to 'ensure inclusive and equitable quality education and promote lifelong learning opportunities for all' (UN, 2015, cited in Fejes, 2019, p. 234).

In our own research profiled at www.multiliteraciesproject.com, a study funded through a Social Sciences and Humanities Research (SSHRC) Insight grant called *The Multiliteracies Project*, we examine an exhibit developed by the Canadian Museum of Immigration at Pier 21. Drawing upon Freire's concept of conscientização and problem posing, we analyze Pier 21's Refugee Canada to illustrate how critical social theory can offer a way to interpret learning experiences connected to bringing about social change. The translator's note in *Pedagogy of the Oppressed* (Freire 1970/2021) explains that 'the term conscientização refers to learning to perceive social, political and economic contradictions, and to take action against the oppressive elements of reality' (p. 35). Critical consciousness can be developed through a dialogical and reflective examination of one's own life experiences, such as living in poverty, where learners may also become aware of the societal factors that impact upon their day-to-day existence and determine to take action to challenge the structural inequities that exist within society. Experiences of migration may include racism, alienation, and despair. But they may also demonstrate resiliencies of communities that have faced adversity, and hope for a better future. Through its programming and exhibits, Pier 21 explores these various elements of the newcomer experience.

Refugee Canada was an exhibition that invited museum visitors into the experience of becoming a refugee and did so in a way that potentially would raise the consciousness of visitors to think more deeply and critically about what it means to be a refugee. In terms of Freire's problem posing, the multimodal exhibit acts as a code to prompt visitors to problematize stereotypes of refugees. The exhibit consisted of a typical, generic living room with a television running in the background with unsettling news stories. Museum visitors go through a door, and on the other side is the exact same living room, but now it is bombed out, and the tv shows the event that led to this destruction. Kristine Kovacevic, Interpretation and Visitor Experience Manager at Pier 21 noted in her interview, 'we wanted to get this idea across that nobody wants to be a refugee and that anyone can become a refugee.' The curators engaged in problem posing by asking visitors to 'just for a second step into the footsteps or into the shoes of a refugee and try to understand the choices that you have to make when you are a refugee.' At the same time, they show how systemic transnational displacements of whole populations are ubiquitous, and historically trace how negative tropes about refugees, and arguments about why it is

never the right time for countries to take them in, have been recycled since prior to the Irish Potato Famine.

Granted, we recognize that any museum experience is not the same as the visceral experiences of actually experiencing war, displacement, hunger, or fear for one's life. In Freire's writings, he is talking about people experiencing the ongoing realities of oppressive conditions. What a museum can do is offer an indirect representation of these experiences that may mimic or symbolize certain dimensions of the lived experience to foster insights and empathy on the part of the learner. Learning through the arts and within community-based spaces such as museums or art galleries can spark dialogue, critique, and understanding (Sanford et al., 2020; Jarvis & Gouthro, 2019).

The exhibit also promotes reflection on inclusion by having visitors write post-it notes answering the question 'How have refugees contributed to your community?' and then sticking these notes on a visual depiction of a community (for example, a note written about a refugee-teacher is posted onto the school). In this way, the exhibit invites refugees to be seen as valuable citizens in their new country. As a part of problem posing, visitors reflect on the power of discourses that run through societies that shape simplistic or more nuanced understandings of people identified as refugees. Another interesting aspect of creating these kinds of dialogical and reflective learning spaces is that they may help staff and visitors to the museum, many of whom themselves have either been immigrants or refugees, or who have had parents or grandparents who have gone through this experience, to make sense of their individual biographies while gaining insights into how structural issues, such immigration policies and programs, may be designed to either include or exclude newcomers to Canada.

In *Pedagogy of Hope*, Freire (1992/2004) reflects on the concept of multiculturalism. In Canada, multiculturalism is a central tenet of government policy and programming, but rarely have we heard the basis for this approach summarized in such thoughtful manner. It is worth quoting at length:

> Multiculturality is a phenomenon involving the coexistence of different cultures in one and the same space is not something natural and spontaneous. It is a historical creation, involving decision, political determination, mobilization and organization, on the part of each cultural group, in view of common purposes. Thus, it calls for a certain educative practice, one that will be consistent with these objectives. It calls for a new ethics, founded on respect for differences (p. 137).

Fostering a truly multicultural society in Canada requires a commitment to social change to create a more inclusive society for all citizens. Freire (1992/2004) states that the *Pedagogy of the Oppressed* (1970/2021), still resonates with educators with 'its relish for the ongoing struggle, which generates hope, and without which the struggle withers and dies' (p. 158).

Analysis and implications

These three examples illustrate how critical social theory can change the work of adult educators. Attention to social structural issues raises hard questions about the purpose of teaching and learning. The contributions of different theorists working within the realm of critical social theory provides insight into how pedagogy in everyday practice may contribute or not to inclusion and equitable circumstances for adults coming from a range of backgrounds. Educators who are interested in developing a critical exploration of how power shapes different learning contexts may be able to offer deeper, more insightful analyses if they draw upon the work of theorists to consider how their research connects

to policies that reflect broader social and political frameworks. Part of what critical social theory does is uncover the ways that neoliberalism co-opts everyday institutional discourses to its own benefit.

Support for adult education is often linked to the potentially ameliorative effects for learning for adults as citizens and workers. Critical social theory enhances the level of analysis of the concept of hope, to go beyond facile neoliberal solutions of the individual making wise choices to improve their personal circumstances, which will ultimately then benefit the larger economy and nation-state. Instead hope needs to be tethered to broader notions of education for social purpose.

In the exemplars provided in this paper, it is evident that the application of critical social theory enhances the ability of scholars to analyze their research. In the study by Finnegan et al. (2019), both participants and policymakers were aligned with a neoliberal discourse of individualisation, whereby HE is perceived to be a simplistic solution to addressing the societal inequities. In and of itself, obtaining a post-secondary degree is insufficient to generate broader structural changes for inclusion. In the study by Fejes, there is a recognition that for migrants to participate in Swedish society as full citizens, they may need new knowledge, skills, and capabilities. However, there is not necessarily an openness to acknowledging that migrants already possess certain kinds of knowledge, such as language skills, and recognition that Swedish society is not static – that normative traditions and expectations, including what a democracy might ultimately look like, will change with the integration of new citizens coming from different cultural, ethnic, and racial backgrounds. In both instances, critical social theory offers insights, in the first article by drawing upon Bourdieu's analysis of social structures to examine in more depth the notion of precarity, and in the second example, to draw upon Foucault's analysis of power and subjectivity to consider notions of full citizenship and how 'the exclusion-inclusion dichotomy is the effect of the exercise of power' (Fejes, 2019, p. 248). In the final example drawing upon our current research, Freire's (1992/2004) work is used to consider how a multiliteracies framework may engage learners in considering the experiences of refugees. Although the multimodal exhibit at Pier 21 is designed to evoke empathy in acknowledging the horror and terror that many refugees have gone through in fleeing war, death, and the destruction of their homes, it finishes with a note of hope – a reflection on human resiliency, courage, and strength, by posing the simple question, 'what have refugees contributed to their new country?' Asking questions such as these challenges learners to reflect upon what it means to live in an inclusive, multicultural society, where citizens come from a range of different backgrounds and experiences, with the hope that they can create a better life for themselves and their families. Adult educators working in a variety of contexts may benefit from drawing upon critical social theory to help them explore the purpose their work, what inclusion means, and how indeed adult education can fulfil the UNESCO Sustainable Development goal of 'lifelong learning for all'.

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

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Citizenship, learning and social inclusion. An interrogation of EU-funded welfare projects in Sweden

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Abstract

The aim of this article is to gain knowledge about how people engaged in EU-funded social initiatives targeting poor EU migrants in Sweden reason about the meaning, hardships, and possibilities they ascribe to the concept of social inclusion. The empirical material consists of a key policy and interviews with staff involved in these social initiatives. The analytical approach is constructionist, inspired by Foucault, focusing on how target groups are constructed, problematised and governed as learners not yet socially included in society or the labour market. In the concluding discussion, the results are discussed in relation to Levitas' thoughts on social inclusion. Key results indicate that discourses on the national and EU level can both facilitate and hinder learning and social inclusion for vulnerable citizens. The article concludes that free mobility within the EU makes belonging and responsibility a complex issue for those engaged in learning for social inclusion.

Keywords: EU migrants, learning, social inclusion, citizenship

Introduction

Social inclusion has been one of the EU's key policy concepts for decades (Schierup et al., 2015). With the goal of counteracting social exclusion and facilitating inclusion for various vulnerable groups, numerous initiatives have been launched and policies formulated in the EU (Schierup et al., 2006). EU policies influence the national welfare politics in the member states, and an increasing political focus on social inclusion is a part of the *Europeanisation* of member states' social policies (Jacobsson & Johansson, 2019). Various EU funds, such as the *European Social Fund* (ESF) and the *Fund for European Aid to the most Deprived* (FEAD), provide tools for the EU to exercise political influence at the local and national level (Scheurer & Haase, 2017). One crucial aspect of the Europeanisation of national welfare politics is the ongoing projectification of welfare,

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propelled not least by the financial structure of EU funds such as ESF and FEAD, where local actors can apply for funding for various welfare projects (Brunila, 2011). Throughout the 2010s, an increasing number of poor and vulnerable people from the EU´s eastern member states, often with Roma identity, have migrated to Sweden in search of income (Roman, 2018; Swärd, 2015; Mešić & Woolfson, 2015). For a long time, migrants have been a prominent target group in European social inclusion discourse, not least with regards to recognition of prior learning and skills that could enhance inclusion (Lodigiani & Sarli, 2017). Roma populations have become a specific target group for learning practices initiated by the EU, and EU funds are recurrently used to improve the living standards of Roma populations throughout Europe (European Commission, 2020).

One prominent way of supporting the inclusion of marginalised groups in the EU is to provide learning opportunities, as lifelong learning is a central concept in EU policy discourse. EU-citizens are encouraged to become active citizens, engaged in lifelong and life wide learning (Simons & Masschelein, 2007; Popkewitz et al., 2007). The EU-parliament, the European Council and the Commission have together formulated a policy document that states the *social pillars of the EU*. The first social pillar is concerned with lifelong learning:

> Everyone has the right to quality and inclusive education, training, and life-long learning in order to maintain and acquire skills that enable them to participate fully in society and manage successfully transitions in the labour market. (European Commission, 2018, p. 11).

The close connection between labour market, inclusion and learning in the quote indicates that the discourse on social inclusion in the EU revolves around labour market participation as a means of counteracting exclusion and poverty.

The problem of visible poverty is not new in Sweden. At the end of the nineteenth century, in Europe as well as in Sweden, political debates about the so-called *social question* revolved around the increasing poverty and vagrancy (Ulmestig, 2007). The mobility of poor people has been considered a political problem in Europe and in Sweden for a long time (Ericsson, 2015; Juverdeanu, 2021; Montesino Parra, 2002) and has been portrayed as problematic regarding the negative effects on welfare systems and labour standards (Hansen & Hager, 2010; Schierup & Jørgensen, 2016). After the second world war, extensive policy measures have been launched to assimilate Roma people into Swedish society (Montesino & Olsson Al Fakir, 2015). In recent decades, in Sweden as well as other parts of Europe, this discussion has often come to focus on people from Eastern Europe, not least poor EU citizens categorised as Roma (van Baar, 2018; Hansson, 2019). The right of EU citizens to move freely between the member states makes the mobility of poor people in contemporary Europe a complex issue for the national welfare states.

Poor people, often with Roma identity, from Eastern Europe frequently exercise the core right of EU citizenship – free movement and the right to reside in any EU member state for a period of three months (Yıldız & De Genova, 2017). Thus, poor peoples' mobility in the EU poses complex issues of belonging and deservingness in relation to the norms about who the ideal mobile EU citizen is. As Carmel and Sojka (2021) argue, norms of belonging in transnational settings, such as internal EU migration, produce complex ethnicised and class-related discourses about who belongs where. I contribute to this discussion by scrutinising how poor EU migrants in Sweden are governed as learning subjects in social inclusion measures. How people engaged in social initiatives discursively produce their target groups and actively negotiate (and sometimes even reject) the dominant discourses on the social problems they are engaged in is often overlooked in research, according to Cabot (2013). Codó and Garrido (2014) also stress

the importance of interrogating how people engaged in learning activities for vulnerable groups tend to position and construct the targeted learners.

In this article, I focus on how the target group of poor EU migrants are constructed as in need of learning to become socially included in society and the labour market. In doing so, I also contribute to a scientific discussion about how different rationalities of governing (Foucault, 2007; Rose, 1999) construct specific target groups, as they are problematised and governed as lifelong learners (see Fejes & Nicoll, 2015; Fejes & Nicoll, 2008; Masschelein et al., 2007).

Previous studies that depart from Foucault and focus on learning practices that target marginalised groups in Sweden have, for instance, examined how the unemployed are disciplined through various activation measures (Hörnqvist, 2008), how job seekers ought to learn to become employable (Fogde, 2008) and how discourses on employability relate to lifelong learning (Fejes, 2014). Studies that specifically interrogate how learning practices targeting marginalised groups seek to foster social inclusion seem to be rather scarce. However, one study by Fejes and Dahlstedt (2017) adopts a Foucauldian perspective in analysing social inclusion measures targeting newly arrived migrants in Sweden. The conditions between the target groups of newly arrived migrants and marginalised EU citizens in Sweden vary considerably. Asylum seekers and third country refugees are in a different relation to the Swedish welfare state as they have several rights (access to Swedish for immigrants courses, establishment support from the Employment Office, support from the social services) that EU immigrants do not. Another similar study that departs from Foucault and analyses migrants in Sweden has been conducted by Milani et al. (2021). They show how migrants are socialised into specific norms and values related to discourses of 'Swedishness'.

Against this background, the aim of this article is to gain knowledge about how people engaged in EU-funded welfare projects targeting poor EU migrants in Sweden reason about the meaning, hardships, and possibilities they ascribe to the concept of social inclusion. Inspired by an analysis deriving Foucault's (1991, 2007) thoughts on the rationalities of governing, as developed by Rose (1999), I adopt an analysis that focuses on how the target groups are constructed and problematised as learners and governed towards becoming includable.

Empirical material and research method

The empirical scope of this article is welfare projects funded by FEAD. These projects seek to enhance the living conditions of poor EU migrants residing in Sweden by working with social inclusion measures (FEAD, 2018). FEAD is part of the Europe 2020 strategy, which supports activities that seek to reduce poverty and combat social exclusion. The total EU budget for FEAD is approximately EUR 3.8 billion. In Sweden, the FEAD budget was approximately EUR 8 million during the programme period 2014–2020. In Sweden, the FEAD fund is administered by the Swedish ESF council, which is a governmental authority (FEAD, 2021).

To ensure anonymity of the projects and interviewees, I deliberately give rather vague information about the projects. Various actors could seek funding from FEAD and the projects were owned by municipalities, the Swedish church, independent churches, and civil society organisations. Some projects worked with outreach activities, meeting their target groups out on the streets. Other projects met their participants in places they knew their target groups were visiting, such as churches and shelters.

The activities of the projects vary, but broadly speaking, they focus on providing health and societal information to their target groups. In addition, the projects provided opportunities for their participants to wash clothes and shower.

The professionals engaged in FEAD projects have varying degrees of working hours in their projects, where some worked full time and some part time. Volunteer workers also provided the projects an important staff resource, for instance, there were nurses and doctors who provided health information to the project participants.

Five FEAD projects were active in Sweden when the empirical material was gathered for this study. This material consists of 16 interviews with staff, project leaders and other persons engaged in all five projects funded by FEAD at the time the interviews were conducted. The FEAD projects were active in all parts of Sweden, from east to west and north to south. Two interviews were carried out by telephone and 14 in person. The interviews took place at the interviewee's workplace.

I have interviewed eight project leaders, one project co-worker, three steering group representatives, two project coordinators and two officials employed at the Swedish ESF council, working with the administration of FEAD. These various positions had, to varying degrees, direct contact with the target groups. Project co-workers were the ones who had the most day-to-day contact with the projects' target groups. Some of the interviewed project leaders were also engaged in practical learning activities targeting the poor EU migrants, while other project leaders had a more administrative role. Steering group representatives and officials at the ESF council did not have close contact with the target groups. What these interviewees had in common was that they all, from their different perspectives, could provide important insights into the FEAD project activities. Hence, the selection of interviewees was made due to their knowledge and understanding of FEAD and the projects in which they were involved.

Project leaders were the category I interviewed the most. The reason for this is that they had a significant impact on their projects' activities and a broad understanding of their projects' relation to FEAD. The project leaders had frequent contact with FEAD staff in Sweden and therefore also had important insights into the regulations and norms framing their project activities. In addition, the interviewed project leaders provided suggestions about other persons engaged in their projects who could provide me with important reflections about their projects.

The interviews were semi-structured in the sense that they followed certain themes, based on my research questions. The interviews were conducted according to scholarly-accepted ethical guidelines in social research, which in short entails that the interviewees were informed about the aim of the study. They were also informed that they, at any time, were free to cancel their participation in the research and quit the interview. Further, all interviewees were informed that they should be anonymised and that the interview material only should be used for research purposes. The study has moreover been ethically vetted.

A potential shortcoming regarding this study is that no interviews were conducted with the target groups. The main reason for this choice is ethical, as I was advised against interviewing project participants by project leaders. This advice was motivated by a worry that the trustful relationships the projects had created with their target group could be damaged if an unknown person approached their participants and asked questions.

During the interviews, I encouraged the interviewees to reflect upon their projects in relation to wider EU policy concepts such as social inclusion and learning and how FEAD and EU policy affected their activities. The interviews revolved around questions concerning how they worked with social inclusion, who their target group was, what they saw as the main problems for their target groups and what they believed their project

participants needed, not least in terms of learning. For this study, three different but similar interview guides were used: one for project staff in leading or senior positions (project leader, co-ordinator, steering group member); one for project co-workers and staff engaged mainly in the day-to-day practices of the projects; and one interview guide for two government officials employed at the Swedish ESF-council.

The interviews, carried out in 2018-2019, lasted approximately one to two hours, and were recorded and transcribed verbatim. The total amount of transcribed text consists of 276 Word pages. After transcription, all interviews were coded into nodes using NVivo, a computer software program designed specifically for qualitative data analysis. The nodes were created by carefully reading all transcribed interviews and categorising the material. The empirical material was then categorised according to the interview questions and the research question, but also more inductively by building on ideas from the interviewees' narratives. In total, the interviews were categorised into 90 main nodes and 12 sub-nodes in NVivo. All empirical quotes in this article have been translated from Swedish to English by the author.

In addition to the interviews, the key Swedish FEAD policy (FEAD, 2018) has been analysed to gain a broader understanding of the political ambitions of FEAD in Sweden. FEAD (2018) is the operative programme constituting the national political interpretation of the European Commission's (2015) guidelines about what FEAD should focus on in the EU. The goal of FEAD in Europe was to fund projects targeting those worst off in society. In Sweden, this group was defined by the ESF as EU migrants who are staying in Sweden but who do not have access to the national welfare system.

Analytical approach

Departing from a constructionist approach, I conduct an analysis inspired by Foucault (1991, 2007) and others who have developed his thoughts on the rationalities of governing and how social problems are constructed in policy and practice (Bacchi & Goodwin, 2016; Miller & Rose, 2008; Rose, 1999) This analytical approach draws attention to how targets are constructed, problematised and governed.

A first step in this analysis is to identify *who* the target group to be included is. I also analyse how social inclusion/exclusion is constructed as a problem for the target group and *why* they are being excluded from society and the labour market, according to the interviewees and the FEAD policy. Further, I analyse *how* members of the target group are being governed, as learning subjects, towards social inclusion. I interrogate what the target groups are constructed as excluded from and what they ought to learn to become included, according to the interviewees.

Learning is, from this perspective, a matter of governing that has been previously analysed with approaches inspired by Foucault (see Fejes & Nicoll, 2008; Masschelein et al., 2007). Learning and governing are both a matter of 'conducting the conduct' of oneself and others (Foucault, 1991, 2007; Rose, 1999). Thus, governing the learning subjects becomes an issue of facilitating learning for the target group. Against this background, the practices I am studying are social pedagogy practices since they seek to address issues of inclusion/exclusion in a changing society by creating learning opportunities for marginalised groups (Cedersund et al., 2021).

In *discussing the results* from the Foucault inspired analysis, I employ three analytical tools elaborated by Levitas (2005) for analysing social exclusion – RED, MUD and SID. I use these concepts to broaden the analysis on the different meanings ascribed to learning and social inclusion by the interviewees and in the analysed policy. From a RED – *redistributionist discourse* – perspective, the problem of social exclusion is a

problem of poverty and inequality produced by society. Hence, the political solution to the problem of exclusion from a RED perspective is concerned with creating a more equal society regarding wealth and other resources. MUD – *moral underclass discourse* – connotes an understanding of social exclusion as primarily a matter of culture and morale among those positioned as excluded. From a MUD perspective, disciplining the poor (Soss et al., 2011) becomes a prominent solution to the problem of social exclusion. The *social integrationist discourse* – SID – constructs social inclusion as a matter of participating in the labour market. The proposed solution to the problem of social exclusion becomes a matter of enhancing the employability of marginalised and excluded groups (Garsten & Jacobsson, 2004). Although Levitas (2005) elaborated her perspective on social inclusion/exclusion in the political context of New Labour in the United Kingdom in the 1990s, I find that the concepts of RED/ MUD/SID provide important insights into dominant discourses on social inclusion/exclusion in the contemporary EU as well.

The following questions guide the analysis: What are the target groups constructed as in need of to become socially included? Why and how are they constructed as being socially excluded from the labour market and society? What problems are the target groups facing in Sweden, according to those who are engaged in FEAD projects? What should the target groups learn, according to the interviewees, to become included in society and the labour market? What techniques of governing are deployed to facilitate learning and inclusion for the target groups?

Results

Defining the target group

The main policy guidelines for FEAD-funded activities in Sweden can be found in the policy document *Operative programme for social participation for persons who are worst off* (FEAD, 2018). In line with the analytical approach, I adopt in this article (Foucault, 2007; Rose, 1999), I now shall pay attention to how the target groups are defined, constructed and problematised. In the analysed policy, FEAD's target group is defined as EU citizens who are not engaged in economic activities and not entitled to financial assistance from the Swedish welfare system.

> Economically inactive EU/EES citizens seem to have a particular problem, which means that initiatives targeting this group of people ought to be shaped according to their specific circumstances. Against this background, Sweden has chosen an operative programme for social participation […] with the aim to aid socially vulnerable persons who do not have the right to support and help according to the Social Services Act (FEAD, 2018, p. 2).

A key formulation recurring in the policy is 'economically inactive EU/EES citizens'. According to Eurostat's glossary (Eurostat, 2020), the economically inactive population consists of those outside the labour force, who are neither employed nor listed as unemployed. In FEAD's policy document, this target group is further consolidated through an EU legal discourse. In the quote below, vulnerable EU citizens are contrasted with other migrant groups in Sweden, such as asylum seekers.

> When it comes to economically inactive persons who stay in Sweden on a so-called EU legal basis, for a shorter period than three months, a comparative basic support is missing. EU citizens who stay temporarily in Sweden have, according to praxis, a right only to emergency assistance. Hence, initiatives targeting economically inactive persons who stay

> in Sweden on a so-called EU legal basis are missing. Therefore, the fund for European aid in Sweden is targeting this population (FEAD, 2018, p. 4).

In this policy, the target group is defined according to their lack of economic activity. However, this discourse is not uncritically repeated by the persons who work in the FEAD-funded welfare projects, as we can see in the following quote from a project leader reflecting on the concept of 'economically inactive citizens'.

> It is not something that we have, I think I recognise it when you mention it, but it is not a term that is used, from my perspective. […] They [the target group] should be economically vulnerable. That is what they should be. […] It [being economically inactive] is not something that we have taken into consideration (Project leader, FEAD project 1).

Here, we can see that the Europeanisation of social policy is not a neat top-down activity. Rather, the policy discourse of the EU is negotiated and sometimes, as we see, rejected by the local professionals who put the policy into practice. A more common label for the FEAD projects' target group is *vulnerable EU citizens/migrants*, which is frequently used by the interviewees. Another project leader reflects on the need to know who their target group is.

> Yes, we call them [their target group] vulnerable EU citizens. […] We need to know who we can consider our target group, which we have met. Mostly it is Roma people from Romania and Bulgaria (Project leader, FEAD project 2).

The interviewee states that their target group is mostly Roma from Romania and Bulgaria. The question of whether the target group is vulnerable EU migrants with a Roma identity is a recurring issue when the project leaders reflect on their projects. In the policy text governing FEAD's priorities in Sweden, Roma as a potential target group is not mentioned at all. During an interview with an official from the Swedish ESF council who worked with the administration of FEAD, it became clear that he did not want to see FEAD as a 'Roma fund'. The interviewed official was aware that some of the projects they funded recurrently described their target group as being Roma. However, the interviewed project leaders were careful not to exclude participants based on not being considered Roma.

> It is important, I had some problems with that to begin with; the target group is socially and economically vulnerable EU citizens, or EU migrants. They don't have to be Roma, they don't have to be from those countries [Romania, Bulgaria] at all (Project leader, FEAD project 1).

Defining a target group is a crucial first step in constructing and problematising a delimited population at which social initiatives can be directed. We have seen that the target group, as formulated in the FEAD policy, is based on the lack of economic activity. The project leaders add the issue of Roma identity, which is described as common among the target group, but does not in itself constitute a basis for being a targeted group for their projects.

Problematising the target group

Now we shift our attention to how the problems of the target group are constructed by the interviewees and what they are portrayed as in need of to become socially included in society and the labour market. The answer from one of the project leaders to the direct

question about what she saw as the major problem for their project's target group was direct and clear: 'Poverty!' (Project leader, FEAD project 5).

Poverty is recurrently raised among the interviewees as one of the main problems haunting their target group. The discussion on poverty is frequently nuanced and connected to wider issues such as (lack of) education; as one project leader puts it 'they [the target group] are completely excluded from the housing market and from the labour market, which are two of the most fundamental prerequisites for living a humane life' (Project leader 1, FEAD project 3). After stating the exclusion from housing and labour opportunities, the same interviewee gave a specific explanation of this idea, which rather problematises the target group based on discourses of cultural deviance and Otherness – 'They have a totally different structure of values to us, which often builds on a collective [identity among their target group], which makes it very hard.'

Problem representations of the target group, which build on discourses of culturalised Otherness, widening the gap between 'us' – the majority, and 'them' – the targeted groups (Anderson, 2013). Here, the target group is constructed as in need of certain interventions due to their ethno-culture, which is constructed as not being aligned with that of a 'normal' European or Swedish identity, in which a specific view of the individual self is taken for granted (Rose, 1999).

> What I feel is important in this project, is that we are working with very shy people who have a totally different way of viewing the world than we have. […] One does not see oneself as an individual [in the target group], but one sees oneself as part of a group (Project leader, FEAD project 3).

A view of the free individual as an autonomous being in relation to other groups and society is central in Western countries (Rose, 1999). As noticed above, the target group of the FEAD projects is constructed as suffering from poverty and thus in need of economic resources. In addition, the target group is portrayed as being culturally different from majority society and thus needs to adapt to certain prevailing norms, such as primarily perceiving oneself as an autonomous individual and not first and foremost as a part of a collective group.

Exclusion of the target group

A similar, but slightly different, question regarding the construction and problematisation of FEAD's target group concerns the interviewees' discourses on why the target group is being socially excluded from the labour market and society. This issue concerns the problems the vulnerable EU migrants are facing in Sweden according to those who are engaged in FEAD projects. Here, Roma identity is once again highlighted by the interviewees in reflecting on the hardships of their project participants.

> We have a very good awareness that you can be poor and live in misery and be a Romanian, or whatever you are, but if you in addition to that are Roma, then it becomes a particular racism, which they are trying to work with in Romania and Bulgaria, but there's a long way to go.
>
> Researcher: I wonder if this antiziganism is apparent in Sweden as well?
>
> Steering group member: Yes, yes, yes (Steering group member, FEAD project 2).

This interviewee reflects on how poverty and racism might interact, particularly when the target group is identified as Roma. The interviewees describe a 'particular racism' that

targets Roma in both countries their target group usually come from (Romania and Bulgaria) and Sweden, where they seek an opportunity to provide for themselves and their families. When I asked another interviewee if their project participants with Roma identity had faced harassment in Sweden, the answer portrayed a harsh reality, with violence and hatred targeting the Roma participants.

> Yes, it is stone-throwing; they threw burning bombs and stones at a camp. […] and then it is these daily harassments, when one sits [begging], one is spat at, one gets sexual invitations, someone kicks your cup. It's everyday antiziganism (Project leader, FEAD project 2).

Another interviewee had a similar reflection on the racism their target group faces on an everyday basis, concluding that: 'I mean, It's daily. Everyone who sits [begging] outside a shop, I would almost say daily, are facing something that one might call hate crime' (Project leader, FEAD project 4). The interviewee then goes on giving examples like the ones in the quote above; people are spat at, kicked, and have their hair pulled. Hence, when the target group of the FEAD projects is described as having a Roma identity, they are also related to a particular form of explicit and historically established racism – antiziganism (Selling, 2013) – which effectively hinders the project participants from successful social inclusion in society as well as the labour market, in both Eastern Europe and Sweden.

In sum, the problems experienced by the target groups of the FEAD projects are represented in three major ways. (1) As social exclusion grounded in poverty; (2) as cultural deviance propelled by a historically established racism – antiziganism; and (3) as primarily in need of work and housing.

Governing the target group towards social inclusion

In the following I scrutinise how the target group is governed as learning subjects towards social inclusion. In the previous section we saw that the target group was portrayed as in need of work and proper housing to become included in society and the labour market. What then are they constructed as in need of to learn to become included? And what are they constructed as excluded from? And into what community or what place are they to become included – in Sweden or elsewhere?

During the interviews, issues of civic rights and obligations were repeatedly evoked by the interviewees. For instance, the interviewee below draws connections between the learning of civic rights/obligations and empowerment. The discourse of empowerment is here formulated as a matter of knowledge about how society functions to improve the chances of the target group to influence their own situation.

> We try to give education and raise competence, to increase their social inclusion and strengthen their empowerment. So, issues of civic knowledge, that is issues about how you can influence your own situation, what rights you have and what obligations you have. That is the focus (Project leader, FEAD project 4).

Further, the issue of learning civic rights is made more complex when connected to the mobility of the target group. The target group is implicitly constructed as needing to learn about their civic rights as their knowledge on this topic is portrayed as 'very low'.

> Many of those we meet have a very basic, very low knowledge, both about the rights in their own country and of course, they know even less about the rights and opportunities in Sweden (Project leader, FEAD project 2).

The interviewee constructs the target group as belonging to another country, which has different civic rights than Sweden. Consequently, the target group is portrayed as having very poor knowledge about their rights in the country in which they temporarily reside, in this case Sweden. How then, are the FEAD projects trying to facilitate such learning? Here, one crucial aspect concerns legitimacy for the projects' activities among the target group. Since participating in FEAD's activities is in no way compulsory for the target group, the projects spend considerable energy reasoning about how to become relevant for their participants. One prominent technique the projects use to create such legitimacy among the target group is to practise a kind of bottom-up strategy. This strategy is based on a will to gain information from the target group themselves – what do they need and want?

> What did we call it, when we interviewed them [the target group], the mapping! It was very good and very interesting to involve them and hear – What do you think? What would you like to have? Many of them have never been asked that question. […] The only thing that came up was that they wanted to learn Swedish (Project staff, FEAD project 2).

The will among the target group to learn Swedish indicates a potential will to be included in Swedish society. However, inclusion in Swedish society is portrayed by the interviewees as being hindered by dominant political discourses about the target group as not belonging to Sweden.

> FEAD has chosen to not have the perspective that they [the target group] should establish themselves here. Because if they should [establish themselves here], then labour market measures and housing should have been a part [of FEAD's activities]. I find that pretty clear from Sweden – 'You are here temporarily, we shall support you in your temporary stay. Then you are going home.' I think that is pretty clear (Head of steering group, FEAD project 2).

The interviewee talks about a dominant political discourse in Sweden that constructs the projects' target groups as not belonging to Swedish society. The interviewee does not assign this exclusionary discourse to any particular political party or organisation. According to the interviewee's interpretation of the rules of the FEAD fund, they are not allowed to work with inclusion through labour market measures nor facilitate proper housing for the target group. This puts the FEAD projects in a tricky situation, as they want to be relevant to their target group and need to be compliant with the hand that feeds them – i.e., FEAD. Another interviewee formulates this paradoxical situation in a striking way, as she says that:

> What inclusion in a country means, is often work to begin with. A place to stay in order to live and provide for one's most basic needs, and we have not really had permission to focus on those things. So, how is one to work with social inclusion for a target group that is not really allowed to be included? It is very hard (Project co-ordinator, FEAD project 2).

As we have seen, the opportunities to facilitate learning and inclusion for the target group are problematised by the interviewees as being hindered by the dominant discourses and regulations of FEAD, and Swedish politics more generally, which are understood as more or less exclusionary towards the target groups of the projects. This further stresses the importance of not seeing Europeanisation as a simple top-down process, where EU policy is easily implemented in the member states. Rather, the people engaged in putting policy into practice are reflective and critically engage with the policies that frame their work with the inclusion of vulnerable EU migrants in Sweden.

Discussion

In the following discussion of the results outlined above, I focus on the limitations and possibilities of learning for social inclusion, targeting poor EU migrants in Sweden by using the concepts of redistribution discourse (RED), moral underclass discourse (MUD) and social integrationist discourse (SID) elaborated by Levitas (2005). In doing so, the results are related to an established theoretical perspective focusing particularly on the politics of social inclusion/exclusion (Levitas, 2005).

I have shown that the main policy guiding the FEAD projects problematised the target group in terms of their perceived lack of economic activity. In EU discourse, being economically inactive means to be outside the labour force, neither employed nor listed as unemployed. This strong focus on employment relates to the overarching discourse that Levitas (2005) calls the social integrationist discourse. From the SID perspective, which is dominant in the EU according to Levitas, combatting social exclusion becomes a matter of facilitating participation in the labour market by learning to become employable (Garsten & Jacobsson, 2004). However, the interviewees tend to see dominant political discourses in Sweden and the regulations of the Swedish ESF council as hindering their work with enhancing the employability of the target group. Here, I have identified a paradox – the SID of the EU is not aligned with FEAD policy and how the work of learning for social inclusion can be carried out in practice. Hence, the Europeanisation and projectification of welfare and social work in Sweden is not a simple top-down process; rather, policy is negotiated and can even be resisted by professionals engaged in practical social work (see Jacobsson & Johansson, 2019). How professionals engaged in social initiatives discursively produce their target groups and negotiate the dominant discourses on the social problems they are engaged in is frequently overlooked in research (Cabot, 2013). By interrogating how the actual people engaged in social support and education for vulnerable groups position and discursively construct their target groups, this article has contributed to knowledge about how the target group of poor EU migrants is constructed as in need of learning to become included in Swedish society and the Swedish labour market.

One of the major problematisations identified in the article is that of culturalising the target group as deviant Others. Problematisations of the target group as culturalised Others widens the gap between 'us' – the majority, and 'them' – the targeted groups (Anderson, 2013). The target group is positioned as deviant in relation to what is implicitly understood as a 'normal' European or Swedish identity. FEAD's target group is represented as problematic, mainly due to what is portrayed as their strong collective identity, in which the individual has little space. Hence, the target group is positioned as deviant in relation to the dominant discourse of the free and autonomous individual (Miller & Rose, 2008; Rose, 1999). Such a narrative draws upon parts of what Levitas (2005) has identified as a moral underclass discourse. From the MUD perspective, social exclusion primarily becomes a matter of culture and morale among those positioned as excluded. Here, disciplining the poor (Soss et al., 2011) by means of moral corrections becomes the logical solution to the problem of social exclusion. Even though such disciplining has not been particularly visible in the empirical material, drawing on a MUD perspective in social inclusion work always risks strengthening the stigma of the groups one is trying to include. Thus, a MUD perspective can be seen as an obstacle for successful social inclusion.

Poverty and racism are identified by the interviewees as the two major obstacles for social inclusion of the target group. This view is similar to what Levitas (2005) has identified as the redistributionist discourse. From a RED perspective, the problem of

social exclusion is first and foremost a problem of poverty and inequality produced by society. In this discourse, the preferred solutions are to create a more equal society regarding wealth and combat the structural racism that hinders the inclusion of the targeted groups. Thus, a RED perspective focuses on changing the majority society rather than disciplining the vulnerable target groups themselves. This structural approach to social work is hindered by the organising of social initiatives as welfare projects strictly targeting learning subjects as individuals.

What then are the major discourses governing the learning subjects of the target group? First and foremost, these are portrayed by the interviewees as a matter of learning ones' civic rights and obligations, both in Sweden and in their 'home countries'. The target groups are governed as individual learners, primarily in a sense that constructs them as responsible for their own inclusion by learning their rights and obligations as citizens (see Miller & Rose, 2008; Simons & Masschelein, 2007; Popkewitz et al., 2007). Hence, to successfully govern the target group towards becoming included in society, civic education is highlighted in the interviews as a necessary first step. The implicit rationality in such discourse is that through knowledge of one's rights one can conduct one's behaviour towards becoming a full member of society, i.e., to become an included citizen. As an effect of the focus on civil rights, FEAD's target group in the interviews is constructed as excluded from citizenship. Two major citizenship rights are proper housing and work opportunities. The target group is positioned as excluded from both, and social inclusion is described as being hindered by the regulations of FEAD. Citizenship and social rights relate to Levitas' (2005) RED perspective, as citizenship is a matter of distributing equal social rights among the members of a society. However, one of the major obstacles to transnational work on social inclusion is the issue of belonging of the targeted groups. The EU's free mobility and the right for EU citizens to reside in the member states makes the issue of *who* is a citizen *where*, and what responsibility this entails for which welfare state, more complex (Juverdeanu, 2021). The question of where the target group belongs, where they should become included, also relates to the EU and free movement (see Yıldız & De Genova, 2017). The target group of FEAD's projects is by definition not Swedish citizens, but citizens from other EU countries who reside in Sweden. Poor EU migrants from Eastern Europe have been considered a socio-political problem in Europe and Sweden, not least regarding the perceived negative effects on welfare systems (Ericsson, 2015; Hansen & Hager, 2010; Montesino Parra, 2002; Schierup & Jørgensen, 2016). In Sweden, as well as in other parts of Europe, this discussion of poor EU migrants from Eastern Europe has often revolved around the category of 'Roma' (van Baar, 2018; Hansson, 2019). As shown in the article, the mobility of poor people in contemporary Europe poses complex issues regarding who is considered as belonging where.

The analysis showed that the target group members themselves potentially wanted to learn to become included in Sweden. However, this was portrayed as being hindered by dominant political discourses on vulnerable EU migrants in Sweden that highlight the temporality of their residence and a political will to exclude 'them' from Swedish society, as they are constructed as belonging somewhere else. This was perceived as a major obstacle for sustainable inclusion work by the interviewees. The idea that the 'official Sweden' does not want poor and vulnerable EU migrants from Eastern Europe bears traces of what Levitas (2005) calls the moral underclass discourse. The MUD perspective is concerned with order and morale, not least when it comes to the nation. In relation to the perceived morally sound community of the nation, the poor are positioned as morally inferior and deviant and hence cannot belong to the majority community according to Levitas (2005). In the empirical material of this article, the MUD perspective is not strong

or explicitly disciplining the poor as argued by Soss et al. (2011). However, the idea that the deprived, poor and vulnerable belong somewhere else and are positioned as deviant in the established welfare state of Sweden is implicit in the analysed discourses.

Conclusions

This article has focused on how people engaged in EU-funded social initiatives targeting poor EU migrants in Sweden reason about the meaning, hardships, and possibilities they ascribe to the concept of social inclusion. The results have shown that the target group is constructed, problematised and governed as learners that are not yet socially included in society or the labour market and that discourses on the national and EU level can both facilitate and hinder learning for social inclusion targeting vulnerable groups.

Future research on the learning for social inclusion targeting marginalised groups would gain from providing a target group perspective, i.e., to conduct interviews and fieldwork with the participants of welfare projects. Here, a longitudinal approach would be particularly useful to see how the experiences of learning to become socially included in society and the labour market evolves over time, from a participant perspective.

In deploying Levitas' (2005) three dominant discourses (MUD/SID/RED) on social inclusion/exclusion, I have widened the analysis of the learning practices. The logic of organising welfare as projects (Brunila, 2011) affects the ways in which the social initiatives can be carried out, facilitating a focus on the disciplining and learning of the individual, which is propelled by the SID and MUD perspectives. Projectification, with its focus on individuals, makes it harder to take a broader, structural approach in line with the RED perspective. However, as the results show, MUD/SID/RED should not be understood as three distinct and clearly separated discourses. Rather, they can be closely related, intertwined, and interact in the same policy area.

List of abbreviations

ESF: European Social Fund
FEAD: Fund for European Aid to the most Deprived
MUD: Moral Underclass Discourse
RED: Redistribution Discourse
SID: Social Integrationist Discourse

Declaration of Conflicting Interests

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Social exclusion in public policies and the micropolitics of an association founded by migrants

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Abstract

The theme of social exclusion has gained visibility in recent years through political discourse. This paper problematises the issue of social exclusion by analysing the counter-hegemonic perspective grounded on the policies of an association, a civil society organization, in Portugal, facilitated by migrants and their descendants. The analysis is the result of a participatory research based on the collection of documentation and semi-structured interviews. The hegemonic discourse on social exclusion was analysed through empirical data from the perspective of those who inhabit and/or intervene in a neighbourhood that is the object of public policies targeting the so-called 'excluded'. Several paradoxes were identified between the social exclusion discourse conveyed in public policies and in the micropolitics of this association. The approach, goals and working methods that characterise the micropolitics of the association may contribute to the emergence of new forms of singularisation, through adult education initiatives.

Keywords: Social exclusion, migrants, public policies, micropolitics, adult education

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Introduction

In recent decades, the issue of social exclusion has emerged and gained visibility, largely through the political discourse of supranational and national institutions, thus becoming the social issue par excellence (Castel, 1995). Since social exclusion is a recurrent and apparently consensual theme within social and political domains, it seems relevant to adopt a critical perspective with a view to defining its nature. Thus, this paper seeks to problematise the theme of social exclusion through the analysis of the counter-hegemonic perspective inherent to the micropolitics of a civil society association, founded and promoted by migrants and descendants of migrants.

The paper stems from empirical data produced in the context of participatory research, conducted in Portugal, on the training and work of the expert by experience in the *Cova da Moura* neighbourhood, in the field of social and community work. The analysis is a snapshot of the theme of social exclusion, based on the perspective of people living and working in a working-class neighbourhood inhabited by immigrants and their descendants. The empirical data underpinning the analysis was obtained through semi-structured interviews and documentation collection.

The research was conducted within the scope of Education Sciences, more specifically in the field of adult education. A critical perspective was adopted, considering hegemonic discourse as an ideological instrument at the service of dominant economic, social and cultural forces, with the purpose of legitimising and perpetuating a social system based on inequalities (Canário, 2005; Freire, 1978; 1980). The research focused on the analysis of alternative practices, which may be deemed counter-hegemonic.

In the approach adopted, the hegemonic discourse regarding social exclusion in public policies is an obstacle to the understanding of the social world since it omits the structural and institutional factors responsible for the marginalisation, discrimination and segregation processes of individuals and groups (Canário, 2005; Freire, 1978; 1980). Thus, it is important to identify and analyse the micropolitics of civil society groups to understand the issue of social inequality in its complexity. These micropolitics, coupled with the usually silenced and invisible perspective of working class individuals, migrants and their descendants, may allow for the emergence of counter-hegemonic practices and discourses, which are essential for social change (Sousa Santos, 2007).

We understand discourse as organized forms of communication (verbal, written, non-verbal, visual) on a given subject, carried out in a social, political and cultural context, with the aim of informing, exposing and persuading. Discourse is a meaning-producing activity that expresses the social, cultural and ideological positions of the individuals involved, both explicitly and implicitly.

The empirical data refer to the terms 'work in tandem' and 'expert by experience', the meaning of which is important to clarify. Work in tandem consists of an activity conducted by two individuals – the expert by experience and the academic expert. The expert by experience is someone with life experience in a given domain (Cavaco, 2018; McLaughlin, 2009), who has undertaken specific training, based on a reflection of their own life experience, geared towards the exercise of activities, through work in tandem. The academic expert is someone who holds an academic qualification in a given area. In the field of health and social work, the emergence of the expert by experience and the academic expert stemmed from a recognition of the complexity of the individual's intervention, experience and singularity, and power to act. Work in tandem is based on a collaborative dynamic between these two professionals who acknowledge the importance of complementarity between academic and experiential knowledge for effective interventions with other people (Cavaco, 2018). Thus, they might ‘help each other,

growing together in the common effort to understand the reality they seek to transform' (Freire, 1978, p. 11).

The paper is structured into five parts. The first presents a brief contextualisation of the *Bairros Críticos* [Critical Neighbourhoods] Programme of the *Cova da Moura* neighbourhood and the *Associação Cultural Moinho da Juventude*. The second focuses on theoretical elements regarding the narrative on social exclusion. The third is related to the conceptual dimensions of micropolitics resulting from civil society initiatives, framed by the field of adult education. The methodology of the research is presented and justified in the fourth part and the fifth presents and analyses the empirical data resulting from the research.

Contextualisation - Elements

The contextual elements regarding the *Cova da Moura* neighbourhood and the *Associação Cultural Moinho da Juventude* came from research (the sources are indicated) and from the testimony of the participants with whom the interviews were conducted. The information on the Critical Neighbourhoods Programme came from the analysis of legal documents and research carried out in the field.

Origins of the Cova da Moura Neighbourhood

In the mid-twentieth century, housing peaked in the Metropolitan Area of Lisbon, with the construction of illegal neighbourhoods in unoccupied or deprived areas on the outskirts of the city of Lisbon. The construction of poor housing and socio-cultural ghettos (Cardoso & Perista, 1994; Coimbra & Menezes, 2009) are associated with poverty and the migration phenomenon. The 'appropriation of urban space' (Cardoso & Perista, 1994, p. 102) is the result of the poverty and inequalities that condition the particular social groups in their access to housing in city centres. An individual's place of residence is a potential inequality factor, for example, in the search for employment, access to transport and public services. Individuals in this situation carry the weight of the space they occupy (Byrne, 1999). The occupation and construction of illegal neighbourhoods are evident phenomena arising from the denial of the 'right to the city' (Wildemeersch & Lages, 2018), that is, the right to affordable housing in spaces with habitable conditions, including the provision of basic physical, social and cultural infrastructures for a dignified life.

The *Alto da Cova da Moura* neighbourhood, more commonly known as *Cova da Moura*, was built from the 1960s onwards through spontaneous occupation. This involved the residents' self-construction of housing and self-urbanization on abandoned private and State land. It is one of the oldest and largest areas with a migrant population within the Metropolitan Area of Lisbon. With approximately six thousand inhabitants (Gomes, 2019), the population has doubled since the 1980s. A highly significant number of the neighbourhood's inhabitants are migrants or descendants of migrants from African countries, colonised by Portugal between the fifteenth and twentieth centuries (Cape Verde, Guinea-Bissau, Sao Tome and Principe, Angola). Among the inhabitants there are also migrants and their descendants from the northern and central regions of Portugal and other countries (Eastern Europe, Brazil, etc.). The growth of the neighbourhood was concomitant with an increase in migratory movements due to factors of a social, economic and political nature (Mendes, 2008). Poverty in these individuals' homelands is one of the

motives for their migration (Morrice, 2019). In addition to these factors, decolonization, war and political persecution are also reasons for migration (Mendes, 2008).

The *Cova da Moura* neighbourhood is characterised by multiculturality, solidarity and the power to act. In the struggle for the right to decent housing, to the city, and to a 'place' (Jorge & Carolino, 2019), in recent decades its inhabitants have opposed the various attempts to demolish the neighbourhood and relocate the residents to public housing, in dispersed areas far from the city centre. The neighbourhood appears to be a place of life and belonging, self-produced by its inhabitants who call for the improvement of its infrastructures and housing conditions.

In 1978, the inhabitants organised themselves collectively and elected a Residents' Committee. The collective organisation arose from the awareness of their rights to a dignified life and the need to vindicate these rights from the public entities responsible for the neighbourhood's infrastructures (running water, sewerage systems, electricity, street works, etc.). There are currently three active associations in the neighbourhood with the mission of promoting the improvement of residents' living conditions: the Social Solidarity Association, *O Clube* (founded in 1980); the *Moinho da Juventude Cultural Association* (officially founded in 1987, but active from 1984); and the *Associação de Moradores do Bairro Alto da Cova da Moura* (founded in 1996). The research presented in this paper focuses on the *Associação Cultural Moinho da Juventude*, better known as 'Moinho', a term that is adopted hereinafter.

Civil Society in the Cova da Moura Neighbourhood

The *Moinho* is a non-governmental, non-profit organization, created and managed by residents located in the *Cova da Moura* neighbourhood. Upon its legal recognition as a Private Social Solidarity Institution, the integration of non-residents into its governing bodies became a requirement. The *Moinho*'s intervention is anchored on a set of key pillars: interculturality, communication, joy, gender, respect for convictions, cooperation, empowerment, environment, creativity, persistence, quality, efficiency, effectiveness and solidarity. Based on these guiding principles, the *Moinho* promotes global and sustainable community development aimed at improving the living conditions of the neighbourhood's inhabitants through the organisation of activities in the social, educational, cultural, sports, professional, economic, legal and urbanistic fields.

By way of example, the following projects designed and implemented by the *Moinho* are particularly noteworthy: *PULO* (parent training and accompaniment for families), *Gabinete de apoio social* [Social Support Office], *Creche Familiar* [Family Nursery] (nanny service, with extended opening hours for babies and children), *Creche e Jardim de Infância* [Nursery and Kindergarten] (for children aged between 4 months and 5 years), the *Centro de Atividades de Tempos Livres* [Leisure Centre] (activities and accompaniment for children and youths from 6 to 18 years of age), *Cantina Socia*l [Social Canteen] (meal services for the more financially disadvantaged members of the neighbourhood and surrounding neighbourhoods), *Kova M Estudio* (studio where young people from the neighbourhood produce and edit music), *Cidadania Participativa* [Participatory Citizenship] (community intervention project seeking to cover the population in a situation of socioeconomic fragility through a decentralised intervention in areas such as health, documentation, domestic violence, support for ex-convicts, and also to promote healthy ageing), *Gabinete de Integração Socioprofissional* [Socio-professional Integration Office] (support and accompaniment of integrated professional and training insertion paths), *Gabinete de Apoio à Documentação* [Documentation Support Office] (formal documentation support for migrants).

A significant part of the *Moinho*'s interventions target children and youths and currently cover over 500 children and young people. The Association develops its intervention with the financial support of the State (through co-operation agreements, applications to funded and co-funded projects), with levies, the provision of services, and the support of both private and corporate sponsors, at domestic and international levels. It is often the first institution with which immigrant citizens come into contact, which reinforces and justifies the need for its action since it is a reference in this field at the national level.

Through its intervention, the *Moinho* seeks to assume a political dimension of a critical nature, which is evident in three lines of action: firstly, its action is based on a model of integrated and sustainable local and community development, grounded on the recognition of the residents' culture, knowledge and skills; secondly, it seeks to secure the continuity of the neighbourhood in the location upon which it was built and opposes the demolition attempts of governmental bodies; thirdly, it promotes and vindicates improvements in the neighbourhood to ensure the residents' 'right to the city' (Wildemeersch & Lages, 2018) and to a dignified life. The *Moinho's* action, in line with the thinking of Paulo Freire (1978; 1980), adopts a political and critical positioning geared towards social change and the construction of a fairer world with less oppression, through *conscientization*. The *Moinho* aims to promote the *conscientization* of the residents of the neighbourhood as political education, providing access to resources and stimulating critical thinking, so that they can, both individually and collectively, observe, analyse and define action and act to bring about change.

The *Moinho* makes its policy known through goals, keystones, organisation and functioning methods, work methodologies and the lexicon used. In its practice, it seeks to ensure coherence, continuity and comprehensiveness. In the last three decades, the *Moinho* has promoted a diverse range of social and cultural dynamics with educational potential within the community, with families, children, young people, adults and senior citizens, and sometimes by means of intergenerational initiatives. Many of these initiatives were designed and implemented through work in tandem between an expert by experience and an academic expert.

The Moinho works with experts by experience in the fields of migration, colonialism and poverty. These experts by experience are individuals who live in the neighbourhood and have undergone training, designed and implemented by the Moinho itself, with a threefold dimension: the explanation and (re)elaboration of experience and life history; the acquisition of knowledge regarding the phenomena of migration, colonialism and poverty; and knowledge acquisition and capacity building in relation to the work in tandem. The work in tandem is based on articulation, complementarity and synergy between the expert by experience and the academic expert, as well as on accompaniment. Since its foundation, the Moinho has resorted to work in tandem to promote intervention in all areas.

Critical Neighbourhoods Programme

Since 1974, several rehousing measures have been implemented with a view to demolishing these neighbourhoods through investment in public housing. Policymakers regard these neighbourhoods as symbols of deprivation, gaps and illegal construction, and they therefore do not fall within the hegemonic parameters and image of the city (Jorge & Carolino, 2019).

The Critical Neighbourhoods Initiative (Presidency of the Council of Ministers, 2005) was part of a public policy initiative for cities between 2005 and 2012, implemented in three neighbourhoods in the metropolitan areas of Lisbon and Porto (*Cova da Moura*,

Vale da Amoreira and *Lagarteiro*), as a pilot programme. This programme sought to ensure the continuity of state interventions for the qualification and rehabilitation of urban territories through what was deemed an integrated and innovative approach (Presidency of the Council of Ministers, 2005). The neighbourhoods of *Vale da Amoreira*, on the outskirts of Lisbon, and *Largateiro*, on the outskirts of Porto, are examples of neighbourhoods built by the State to rehouse families living in shanties. The *Cova da Moura* neighbourhood was built by the residents on abandoned land on the outskirts of Lisbon.

As a justification for the relevance of this measure, the Resolution of the Council of Ministers, under which it was legally framed, pinpointed the three territories of the intervention as critical neighbourhoods due to the 'concentration of social problems, to the disadvantaged and disempowered populations, to the concentration of groups most vulnerable to different forms of discrimination, to the social stigma associated with them and the blocked opportunities' (Presidency of the Council of Ministers, 2005, § 5). Moreover, from the legislators' perspective, these neighbourhoods represent a major risk to the quality of life and competitiveness of metropolitan areas (Presidency of the Council of Ministers, 2005). The document states that implementing measures in these urban spaces is a complex matter and that the results are not long-lasting.

(De)construction of the discourse on social exclusion

In this paper a critical perspective is adopted, in line with the thinking of Paulo Freire, Robert Castel and Rui Canário. It is important to analyse ‘what is hidden in this discourse on exclusion and translates the social issue’ (Castel, 1995, p. 13) in contemporary society. The theme of social exclusion gained popularity in the 1990s, in the context of public policies, especially in Europe (Mascareño & Carvajal, 2015). Since then, its presence has been increasingly noted in the discourse of policy makers and the media (Bouquet, 2015). This discourse is by no means anodyne, on the contrary, it might reflect political positions towards social phenomena which lead to social action in a given direction, precluding and silencing other approaches. The terms and concepts used may establish ‘a linguistic action’ (Guilhaumou, 2012, para. 14) influencing how the reality is understood.

The discourse on social exclusion ‘reveals pitfalls both for sociological reflection and for political action’ (Castel, 1995, p. 12). The term 'social exclusion' itself is used as an umbrella to encompass the diversity of poverty in the world, in other words, the great diversity of extreme situations of individuals and groups (Castel, 1995). Since it is a term that can designate a great variety of phenomena, it does not differentiate between them, perhaps, giving rise to an amalgam (Canário, 2005). We would argue that, instead of serving as a useful mental tool for the construction of scientific knowledge, it is an obstacle to its production.

In the political discourse on social exclusion, social phenomena are frequently simplified and the individuals themselves are blamed and held to account. This discourse underestimates the processes that enhance social inequality, such as the precariousness of work relationships and the fragility of social relationships (Castel, 1995). From our point of view, this narrative describes social phenomena but does not address their dynamics and causes, silencing the social and institutional mechanisms that generate social inequality and the denial of citizens' rights (Canário, 2005; Castel, 1995), which undermines an understanding of these phenomena.

There is an underlying negative meaning to this political discourse which is related to a deficit or lack of something (Castel, 1995), and this may represent a threat to the social groups who find themselves in these circumstances (Canário, 2005) owing to the

risk of stigmatization stemming from this discourse. Scapegoating, infantilization and segregation are functions associated with the capitalist economy which can give rise to dominant subjectivity and influence life in society decisively (Guattari & Rolnik, 1996). Although they substantiate welfare for those in situations of social vulnerability, it is important that public policies not replace or prevent the fight against its causes (Castel, 1995).

The expression social exclusion has a 'paradoxical meaning in that there is nothing "outside" the social' (Canário, 2005, p. 36). This expression conveys novel language, uncritically imported from the technical and political fields into the scientific field. The term is 'an object of tautological use which, in the case of the social sciences, is an epistemological obstacle to understanding the social world' (Canário, 2005, p. 36). So, as far as Canário (2005) is concerned, the terms exclusion and inclusion should be rejected as tools for analysis, as they correspond to dimensions of the same phenomenon. In the same vein, Castel (1995) expresses reservations on using the term ‘exclusion’ and considers that it should be replaced ‘by a more appropriate concept to name and analyse the risks and current social fractures’ (p. 13).

Social inequality stems from the organisation and functioning of the social structure, which is why it occurs in the ‘centre of social life and not its periphery’ (Castel, 1995, p. 15). From this perspective, Paulo Freire (1980) considers that marginalisation and segregation involve placing someone ‘outside’, ‘on the sidelines’, therefore, one must question ‘who the author of this movement from the centre of the structure to its margin’ is (pp. 73-74). In the political discourse, individuals considered marginal are defined as being on the outside of the social system, yet these people have always been on the inside (Freire, 1972). According to Freire (1972), overcoming inequalities implies changing the social structure.

The social structure gives rise to situations that cause renegades in relation to whom the feeling of inferiority and incapacity has been 'emphasised' (Freire, 1978, p. 15). In Freire's view (1980), marginality is not a choice, these individuals are systematically denied the most basic rights. According to the author, by changing these structural mechanisms, generators of violence, perpetuators of poverty and multiple inequalities, ‘the dehumanizing structure’ could be transformed (Freire, 1980, p. 75). Individuals living in poverty and all those who are denied the most basic rights represent the dominated structures of society, deprived of the right to assume full citizenship, but who nevertheless consciously or unconsciously oppose those who trivialise and dehumanise them by treating them as worthless objects (Freire, 1980). Paulo Freire (1980) considers that transformation of the dehumanising structure involves critical intervention. This enables those who have been dominated and subjugated by an alienating power to free themselves and claim their rights with a critical conscience and spirit (Freire, 1980).

Micropolitics and civil society's power to take action

The approach of contemporary political philosophy is adopted to problematise political power, among other dimensions. Policies, through power and control, assume a ‘social mediation function in the reorganisation of the social order, through different systems' (Junqing, 2008, p. 58). For Junqing (2008), policies can be analysed from two different, but complementary and interdependent levels, namely through macropolitics and micropolitics. Macropolitics focuses on large-scale power structures and regulation and control mechanisms, such as the organisation of the State and the mechanisms through which it exercises its power (Junqing, 2008). Micropolitics, on the other hand, is centred around small-scale power structures, as exemplified by ‘the control mechanisms inherent

to social activities and everyday life' (Junqing, 2008, p. 58). Through the explicitness of the micro-political level, (re)constructed discourses and practices in certain groups, communities and organisations can be identified and analysed. This approach, that integrates both macro and micropolitics, makes it possible to (re)consider policies on the basis of diversified, heterogeneous, multiple and complex social dynamics at all levels of society and daily life.

The micropolitics (re)constructed by individuals and groups in everyday life might correspond 'to different forms of social integration' (Guattari & Rolnik, 1996, p. 11), and makes it possible to analyse the singularity of experiences constructed individually and collectively. Our interest in micropolitics stems from the enhancement of unique experience and subjectivity.

The micropolitics of groups and social movements that fight on behalf of minorities and social causes may foster the production of new forms of subjectivity (Guattari & Rolnik, 1996). These 'subjective singularization processes' (Guattari & Rolnik, 1996, p. 45), characterised by plurality and individual and collective action, can constitute resistance mechanisms against the 'general serialisation of subjectivity' process (Guattari & Rolnik, 1996, p. 45), typical of the capitalist system. Singularisation might be a disruptive process against capitalist subjectivity, asserting itself through ways of being, sensibilities and perceptions that differ from those that are more common or instituted (Guattari & Rolnik, 1996).

The diversity and complexity of challenges in contemporary society seem to require an interconnection between 'public policies and the increasingly formalised initiatives of civil society' (Fleury, 2015, p. 2). It is in this sense that Fleury (2015) considers that social intervention devoid of the active participation of individuals, without considering their power to act, is a counterproductive process. According to Fleury (2015), politicians no longer hold a monopoly over policymaking in contemporary society, as citizens are increasingly concerned with action in the public sphere. Individuals develop initiatives, design instruments, experiment, validate and disseminate them, which justifies the emergence of policies resulting from civil society action (Fleury, 2015).

Some civil society entities, namely associations, implement community intervention in locations set in urban peripheries, characterised by multiculturalism and predominantly inhabited by migrants and their descendants. For immigrants, the organisations established within the community are the preferred sites for adult education (Guo, 2015) through the dynamics that foster non-formal and informal education and experiential training. These organisations operate in very diverse areas and aim to promote the establishment of networks, culture and identity affirmation, and the development of a relational dimension. In addition, they try to play the role of transition institutions, functioning as promoters of immigrants' process of integration into society on the one hand, and as mediators between them and the host States on the other (Guo, 2015). Due to its historical commitment to social movements and social justice, the field of adult education is a structuring domain in the intervention of these civil society organizations.

Methodology

As mentioned above, this paper problematises the issue of social exclusion by analysing the counter-hegemonic perspective grounded on the policies of an association, in Portugal, facilitated by migrants and their descendants. The analysis presented in this paper is a cross-section of empirical data produced within the framework of a participatory research, conducted in Portugal, on the training and work of the expert by experience in the *Moinho*. Participatory research favours the construction of scientific

knowledge through the 'ecology of knowledge' (Sousa Santos, 2007). Hence, this research is grounded on a recognition of the importance of dialogue and the interdependence between scientific knowledge and the popular knowledge of urban migrant populations. The study adopts the perspective that the construction of scientific knowledge results from the commitment, experience and knowledge of all the actors involved, and seeks to counteract the hegemonic tendency in which 'the particular and the local does not count, it is invisible, disposable, despicable' (Sousa Santos, 2007, p. 31).

From an epistemological point of view, this participatory research is framed by the emerging paradigm since it acknowledges the twofold importance of the scientific paradigm as also a social paradigm of decent life (Sousa Santos, 1987). Against this backdrop, the study sought to involve individuals and institutions related to the issue under study, through participatory and co-constructed processes (Vaughn & Jacquez, 2020). This type of research is anchored on reflection, flexibility and interactivity (Cornwall & Jewkes, 1995). In the present participatory research, the relationships between the various agents were based on horizontality, dialogue, recognition and reciprocity. The decision to conduct this participatory research was both to ensure the construction of socially relevant scientific knowledge and to promote training processes for all those involved in order to boost each individual's power to act (Ricoeur, 2005).

Techniques and procedures

The empirical data presented in the paper is the result of a participatory research, conducted in the neighbourhood of *Cova da Moura*, with individuals connected to the *Associação Cultural Moinho da Juventude*. Various techniques were used in the participatory research, such as: document collection, participant observation, informal conversations, biographical workshops and semi-structured interviews. In the paper, the empirical data underpinning the analysis was obtained through the collection of documentation and semi-structured interviews. The collection of documents focused on the legal framework of the national *Iniciativa Bairros Críticos* programme. Three of the interviewees live in the neighbourhood of *Cova da Moura* and are connected to the *Moinho*: one of the interviewees is a founding partner of the Association and is currently involved in projects in the area of *Participatory Citizenship* (Matilde), the other is a young adult participating in the Association's projects (Bruno), and the third interviewee is a worker, an expert by experience and member of the Association's administration board (Berta). A fourth interview was also held with a technical staff member working at the Association, who works in tandem as an academic expert (Dalila).

In the semi-structured interviews, the aim was to systematise issues that had been previously addressed in informal conversations. The semi-structured interviews were conducted according to a script, previously provided to the participants, with the following themes: neighbourhood characteristics and life, migration, 'social exclusion', work in tandem and expert by experience. The interviews were guided in a flexible manner, with attention to the epistemology for listening (Berger, 2009).

The empirical data underwent a thematic content analysis (Bardin, 2018). To guarantee an interpretative content analysis, the content of the interviews was organized systematically around categories (themes) and subcategories (subthemes) already included in the interview script, and around others that emerged from the data itself. In the analysis presented in this paper, the following themes and sub-themes were considered: discourses (discourses on the neighbourhood, discourses on 'social

exclusion'), logics and disputes (disputes over space, public policies and the work of the *Moinho*).

The participatory research followed the ethical principles of research in the field of Educational Sciences (All European Academies, 2017; Sociedade Portuguesa de Ciências da Educação, 2020). The names of the interviewees are pseudonyms in order to guarantee their anonymity. The association involved was not anonymised for three reasons. First, the use of another name would not ensure anonymity, given the specific nature of its work and the terms used. Second, participatory research assumes a political dimension, which in this case aims to acknowledge and give visibility to alternative, more sustainable and fair social practices, which are usually silenced and rendered invisible. Third, the association also considers this to be an important option. This paper is the result of a collaborative writing process with all the individuals involved.

Discourses on the neighbourhood

The discourse and words contained within it are neither neutral nor anodyne, on the contrary, they define positions, based on representations of the world, associated with particular perspectives and purposes. The interviewees highlighted the non-neutrality and subjectivity of the discourse on the neighbourhood, which they consider valid for their perspective, but also for political and social perspective:

> it is very hard to characterise in general terms, mainly because I have lived here for so many years which makes an objective view difficult, but also I do not think there can be objectivity in terms of characterising a neighbourhood (Matilde).

> I grew up here when I was little, I don't have a very objective point of view (Bruno).

This subjectivity is important to understand the neighbourhood from the perspective of those who inhabit it, who have built and continue to build it as a habitable space, and who, as a rule, do not have a voice in the public sphere. Additionally, it might allow for the visibility of counter-hegemonic subjectivities that criticize the reductive nature of the discourse disseminated in the public arena.

Cova da Moura has been officially classified as a rundown, illegal and ‘clandestine neighbourhood’ (Graça & Paio, 2018). In political and public discourse, the neighbourhood is usually portrayed negatively, as 'critical', 'vulnerable', 'violent', 'clandestine', 'rundown', 'illegal'. The *Cova da Moura* neighbourhood was selected by the *Iniciativa Bairros Críticos* whose aim was to regenerate ‘critical urban areas’ (Presidency of the Council of Ministers, 2005, §4). The respective urban areas were described on the basis of problems, needs and gaps, reinforcing the negative perspective of these territories and of their inhabitants:

> their concentration of social problems, the disadvantageousness and lower qualifications of their populations, the concentration of groups more vulnerable to different forms of discrimination, the social stigma associated with them and blocked opportunities (Presidency of the Council of Ministers, 2005, §4).

In the above discourse, the territories and their inhabitants are what constitute the social problems, without mentioning that the living and housing conditions and insufficient schooling are consequences of inequality and the asymmetric distribution of wealth, consented by the political and social systems. Furthermore, no mention is made of the positive characteristics of these territories and the people who live there. For the residents

and technical staff working at the *Moinho*, the *Cova da Moura* neighbourhood is a place of life, belonging, well-being and positive long-lasting relationships:

> [The neighbourhood is a] living and dynamic territory, [where the person] public space is appropriated (Dalila).

> It's more the environment that I like in the neighbourhood. I feel at home, I feel safe, being with people who are like me, people who understand me (Bruno).

> For the people who have left the neighbourhood, this is their place, where they like to spend their holidays (Matilde).

As far as the sense of safety highlighted by the inhabitants is concerned, they refer to the paradoxical political and social discourse surrounding the neighbourhood. A negative image has emerged from the political and social discourse surrounding the neighbourhood which is difficult to counteract. The inhabitants are aware that the discourse produced on the neighbourhood interferes with the social construction of reality. They highlight these dimensions:

> this is very interesting, this feeling of being safe, because people always say that this neighbourhood is dangerous, but this is the feeling the people here have, of feeling safe. I feel it too (Matilde).

> It's a really cool neighbourhood. It's not what you think and see on television, on the contrary, everyone is nice, everyone is cool (Bruno).

These areas are deemed critical and priority cases in public policies, based on two interconnected arguments. On the one hand, it is deemed essential to promote citizenship and social cohesion, while on the other, these territories are regarded as a risk to quality of life and competitiveness in metropolitan areas. A reductionist perspective of citizenship is conveyed, as the emphasis is on social peace and economic development to the detriment of safeguarding the poorest citizens' basic rights. This is evident in the following statements:

> they constitute the most urgent challenge in terms of promoting citizenship and social cohesion (Presidency of the Council of Ministers, 2005, §4),

> they represent a considerable risk in terms of behaviours that can undermine the quality of life and competitiveness of the main metropolitan clusters (Presidency of the Council of Ministers, 2005, §4).

An analysis of the empirical data reveals another paradox. The political discourse interprets citizenship as a dimension of regulation, essential for social peace and for the competitiveness of territories. The interviewees highlight cultural diversity, liveliness and solidarity as important characteristics of the neighbourhood. The neighbourhood is characterised by its very young population, cultural richness, African origins, cooperation and mutual help, despite the financial hardship of its residents:

> it has young people with vibrant energy and great skills […] has a liveliness that comes from Africa. Liveliness and at the same time a lot of strength, depth and a lot of humanity […] they support other neighbours in different ways, without making a fuss, in terms of education, health, and in terms of food. […] There is solidarity here, there is synergy. [People] have brought really valuable cultures from Africa – from São Tome, from Cape Verde, from Angola (Matilde).

> the word that best describes it is solidarity […] it gives a good characterisation of what the experience of the people who live here is like (Dalila).

Discourse on social exclusion

In this paper, only the issue of asymmetry in the 'right to the city' is addressed, namely, the right to live close to one's workplace and the city centre. The interviewees criticise the political discourse in which the residents of the *Cova da Moura* neighbourhood are regarded as 'excluded'. They believe it is essential to take the diversity of the situations in the neighbourhood into consideration instead of making simplistic generalisations, as may be seen below:

> it makes no sense (Matilde).

> [At the *Moinho*, we don´t use] the terminology of social exclusion or social inclusion, not least because we understand it much more as a process dynamic […] of feeling socially included or excluded is subjective and is not directly confined to an economic issue or a territorial issue […] what may make me feel socially included, may be different for you […] we often see this, people in very vulnerable circumstances, from a socioeconomic point of view, who don't really show that they feel particularly excluded […] because within their own system, relationships are established and they find […] the resources that allow them to feel included or at least not to feel excluded, both from a social and economic point of view (Dalila).

Interviewees highlighted the diversity and complexity of the structural and institutional factors that generate inequalities. However, in their view, public policies have no bearing on these factors. Therefore, they regard the political discourse as contradictory since although it identifies social problems, the policies and institutions themselves generate and perpetuate inequality:

> the institutions are the cause of our exclusion (Matilde).

> because inclusion means including someone, but most of the time it's excluding, so it's exclusion […] it's only words, they are only written [...] they are things that are written, but in practice it is only written […] I often say to my co-workers at the *Moinho* - We are not politicians, the politicians are the ones who write one thing and do another (Berta).

It is the inconsistency between the hegemonic political discourse and effective action that underlies her critical analysis. The interviewees highlight multiple historical, cultural, economic, political and social factors and phenomena of a structural and institutional nature that generate inequalities, such as: colonialism, poverty, violence, racism, segregation, asymmetries in the labour market (precariousness, low income), disparities in educational access and performance, difficulties in accessing information regarding rights, difficulties in acquiring Portuguese citizenship, asymmetries in the 'right to the city' (Wildemeersch & Lages, 2018), etc. It seems that, from the interviewee's perspective, these factors (re)produce and naturalise differentiated power relations which, in turn, define social and economic positions, acting as social regulation instruments with the power to decide who stays in the centre and who is relegated to the margins.

Space-related disputes

The illegal origin of the neighbourhood, built on private and state property, the lack of infrastructures and urban planning, the location and real estate speculation are factors that have conditioned its legal recognition and the creation of conditions to improve the quality and stability of the lives of its inhabitants. Over the years, several projects for the neighbourhood have emerged, almost always in an attempt to rehouse and relocate the families to more peripheral areas, which has been contested and has served to strengthen the residents' fight for the 'right to the city' (Wildemeersch & Lages, 2018).

The dispute over the occupation of space in the neighbourhood, which is on the outskirts of the city of Lisbon, with high real estate potential, is an obvious factor. The attempt to shift to the margins and remove from the centre, in this case, is also geographic. At the root of the difficulty surrounding the urban legalisation of the neighbourhood and its recognition by public entities, namely the Municipality of Amadora, was the intention to impose its demolition and relocate its inhabitants to other locations, further removed from the outskirts of Lisbon. In this case,

> in a Djunta Mô [Cape Verdean expression meaning holding hands and mutual help] of the three associations and with the support of the parish, we managed to halt the Mayor of Amadora's project in 2002, which intended to destroy 85% of the neighbourhood (Matilde).

As the neighbourhood has not yet been legalised, there is always the fear of this occurring again. The evident competition for space has caused fear and distrust among the residents, as they are constantly aware of the real risk of being rehoused and the demolition of the neighbourhood:

> the neighbourhood used to be 47 acres. Since 2009 it is only 39.5 acres. This is a consequence of political options taken on the sly […] I'm against that (Matilde).

This reduction in the neighbourhood's space was a measure adopted at the time of its involvement in the *Iniciativa Bairros Críticos*. The 7.5 acres ceased to be part of the neighbourhood, although the residents were unaware of this. In 2011, they discovered that the *Santa Casa da Misericórdia* (charitable organisation), initially a

> partner of the *Iniciativa Bairros Críticos* project, had ceased to be a part of it in 2009, and had subsequently obtained a license to build the Continuing Care Unit, reducing the land in *Cova da Moura* from 47 to 39.5 acres hectares on the title deeds (Matilde).

The Critical Neighbourhoods Initiative, designed to solve community problems, was used to legitimise the reduction of neighbourhood space and the construction of a service that does not serve the population:

> it is a political balance game between the PSD [social democratic party] and the PS [socialist party], without considering the needs of the population. The Continuing Care Unit does not serve the population (of the neighbourhood). The Nursery serves the population of the neighbourhood and is a basic need (Matilde).

However, the construction plan for the *Moinho* nursery was cut short, even though they had land, funding and an architectural project. The residents feel that this is an injustice, which undermines the credibility of public policies:

> but the Mayor blocked it. He forced us to wait for the Detailed Plan within the scope of the Critical Neighbourhoods Initiative (Matilde).

The promotion and enhancement of the neighbourhood's cultural manifestations is a fundamental strand of the *Moinho's* intervention, geared towards its official recognition and dignification, personal and identity development, and the strengthening of community spirit. This has become a means of fighting against attempts to demolish the neighbourhood and for the residents to claim their 'right to a place' (Jorge & Carolino, 2019). The *Moinho* prepared an application for recognition of the *Kola de San Jon*, a traditional Cape Verdean festivity. In this manifestation, involving music, dance, lyrics and artefacts, the facilitators recreate elements of Cape Verde's cultural tradition. As a Cultural and Intangible Heritage of Portugal since 2013, culture, in particular the *Kola San Jon*, has saved the neighbourhood from demolition:

> Those who are part of both the Kola and Batuque feel immense pride. I think the neighbourhood does too, the fact that it was published in the *Diário da República* [Official Gazette]. This means that the neighbourhood cannot collapse because we have Kola. (Matilde)

Batuque is a musical-choreographic expression of Cape Verde's cultural heritage, which was ostracised during the period of Portuguese colonisation. The women who perform batuque, called *batucadeiras*, define the melody, rhythm and lyrics of the songs. These songs refer to life experiences, feelings, vindications and gratitude.

Public policies –innovative interventions or imposed from the outside?

The *Iniciativa Bairros Críticos* may be noted as an example which, as an instrument of city policy, was publicised as an innovative public policy. In its framing documents, the following structuring principles are mentioned: integration, sustainability and durability, cooperation, mobilisation and participation of actors, transparency, communication and articulation, intention to generate structural impacts, innovative intervention and management models (Presidency of the Council of Ministers, 2005). Although designed on the basis of accumulated experience in prior public policy interventions, in practice, this programme appears to have reproduced a technocratic and welfare-based perspective. Although the aim of this public policy was to promote participation, it was designed without the intervention of the inhabitants of the neighbourhoods, as may be deduced from the following interview excerpt. The residents presented a proposal to designate the intervention areas, which was ignored:

> during the *Iniciativa Bairros Críticos* project, a name that was not chosen by the residents who wanted to call it *Bairros Criativos* [Creative Neighbourhoods], but by a government body […] We had proposed *Bairros Criativos*, but no, they opted for *Bairros Críticos*. There is a lot of creativity in our neighbourhood (Matilde).

Although the legislation on the Critical Neighbourhoods Programme foresees participation, cooperation, transparency, communication and articulation, in practice this has not been the case. The initiatives have been defined and imposed on the inhabitants of the neighbourhood, without taking their perspectives and experiences into consideration:

> people from outside the neighbourhood were chosen to organise the meetings and prepare the projects […] the most important decisions were made in the absence of the residents […] the technical staff came from outside and made the decisions. We, the residents, could

> go to the meetings, we had a vote on behalf of the Neighbourhood Committee, but there were seven coordinators and our vote did not carry any weight (Matilde).

The welfare model has been reproduced, whereby the population is the object of intervention. The attempt to impose measures that are meaningless to the residents is clear:

> there were three associations in the neighbourhood and the coordinators decided that they should all merge into one and paid a university professor to prepare the Ancora Project […] this makes no sense, because that's where the wealth resides, each association has its own dynamics (Matilde).

Interventions of a technocratic and welfare-based nature, taking residents as objects and infantilising them, disregarding their knowledge, traditions, cultures and problems, are highlighted in the interviewee's speeches. They use the argument based on the deficit and incapacity of the inhabitants of the neighbourhood:

> it had to be organised by outsiders. […] – Ah! You don't know how to collaborate! [She also adds, in a tone of irony] One institution came here to teach us all, because we didn't know… teach us how to dialogue, how to have meetings (Matilde).

Work in tandem - the expert by experience and academic expert duo

The *Moinho* aims to promote an alternative way of working to technocratic and welfare-based models. The work in tandem between the expert by experience and the academic expert is a structuring element of the *Moinho*'s policy and, as such, it has featured in all the initiatives since the beginning of its intervention. The work in tandem is the basis of the *Moinho* and is aligned with the principles of Paulo Freire and the *Juventude Operária Católica* [Catholic Youth Workers Movement]. *Conscientization* and the political dimension of the intervention are pillars of its action:

> [the practices integrate] diagnosis, reflection and action [this embodies] the political dimension. Political in the broadest, most beautiful sense […] policies drawn up in the offices of the consultants perpetuate poverty, migration... The work in tandem provides a new vision, another perspective, 'human' action' (Matilde)

> The work in tandem enhances the relevance of the intervention resulting from the collaboration between the academic expert and the expert by experience, namely in terms of the actual design of intervention projects and their effective implementation (Dalila)

The dialectic relationship between theory and practice, and between scientific knowledge and knowledge resulting from experience, dimensions of Paulo Freire's thinking, function as pillars in the practices of the *Moinho*. As characteristics of work in tandem, synergy, complementarity and the joint efforts of the expert by experience and the academic expert are particularly noteworthy. Thus,

> the academic expert, with his/her skills and knowledge of the international literature on the subject, formulates various hypotheses, ideas and several paths, and the expert by experience, with his/her knowledge resulting from reflected experience, try together to understand what is happening. […] This synergistic effort is very important. (Matilde)

The *Moinho* has implemented work in tandem in all its areas of intervention in the neighbourhood, with a particular focus on poverty, migration, and the consequences of colonialism. An example of this is the work

> with the *batucadeiras*, with those from the *Kola San Jon* group. These people have told the story of the importance of their culture and the repression of the colonisers before 1974 in Cape Verde themselves. [In this case,] it is because the importance of their culture was formulated, put in a context, that its recognition as Intangible Cultural Heritage became possible (Matilde).

The researching, explaining and recording of individual and collective memory on the social and cultural dynamics of the Cape Verdean people

> was carried out with academic experts who were able to put this information on the required forms, and it was a very beautiful example. The work of the experts by experience began in 1991. […] I didn't know anything about Kola, then I began to learn, we went looking for people in Cape Verde, an anthropologist, then little by little we managed with the support of more academic experts in Portugal (Matilde).

Recognition of the experience of individuals who have lived through situations of migration and poverty and their work as experts by experience fosters integrated and sustained intervention in the neighbourhood and contributes to the fulfilment of those involved. This is highlighted by the interviewees:

> this is very rewarding for me and it is very important because the expert by experience has already been through certain situations, and is able to make an analysis of the experience and help others. [Through the intervention process] 'I acquired more experience […] More knowledge. […] I learned a lot, really a lot. I learn every day, with each of the those I do the intervention with, I learn […] I have many success stories and that motivates me to continue, which is a sign that I am doing well and that is important (Berta).

> [The intervention of the expert by experience] is absolutely important and fundamental (Dalila).

The experience of civil society, through the De Link Association, and the recognition of the importance of experts by experience in public policies, abroad, in the field of poverty have served as a reference and an inspiration for enhancing the work accomplished by the *Moinho* in the field of adult education. The design of the training framework and the recognition and validation of acquired experience occurred

> in the early 90s, when the Belgian managers of De Link, an institution for training experts by experience, came here. Experts by experience are officially recognised by the Belgian Government (Matilde).

Final considerations

In recent decades, exclusion has become the main social issue (Castel, 1995). The social visibility and apparent consensus surrounding the subject has given rise to a hegemonic perspective that seems to have contributed to the neglect and silencing of alternative perspectives. The empirical data resulting from this study with actors from a civil society association reveal the complexity of the issue and some of its inherent paradoxes. The experience, knowledge and micropolitics implemented by the residents and technical staff of the *Associação Cultural Moinho da Juventude* possibly contribute to finding

alternatives to the political-normative perspective underlying public policies in the field of social exclusion.

Inequality, segregation and marginalisation are actions that place people and groups 'on the margins' of the established system (Freire, 1980), through oppression and the denial of human rights. The empirical data of this study may contribute to the analysis of how these movements from the centre of the structure to its periphery are (re)produced (Freire, 1980). In addition, they can also contribute to the understanding of certain pitfalls, generated by the hegemonic discourse, which affect political action and have consequences for sociological reflection (Castel, 1995). The experiences reported by the interviewees reveal the accountability, inferiority and segregation processes (Guattari & Rolnik, 1996) to which they are subject in their daily lives, due to the fact that they meet two conditions - being migrants and residents of a self-built neighbourhood in an urban periphery. As highlighted by the participants, these complex processes are (re)produced in everyday life, through discourses and practices conveyed by the instituted system, through what is said and what is silenced.

Political guidelines on social exclusion focus essentially on locations, groups and individuals deemed ‘excluded’ or at ‘risk of exclusion’, are silent as regards the structural and institutional factors that generate inequalities, segregation and discrimination, as shown by the *Iniciativa Bairros Críticos.* These guidelines act on the outcomes and neglect the causes of social problems, which might largely explain their ineffectiveness. Usually, they essentially use pejorative vocabulary to name these locations and describe them on the basis of problems, without referring to resources or potential (Canário, 2005; Jorge & Carolino, 2019). From a critical perspective, the interviewees reinforce the importance of acting on the causes of inequalities and oppression, considering the interdependence of the various phenomena. They highlight the effects of colonialism, the asymmetrical distribution of wealth, problems in the labour market (unemployment, precariousness and low wages), and asymmetries in human rights.

Given the complexity of social problems, it seems to us to be ‘counterproductive’ (Fleury, 2015) to insist on interventions that do not consider the desire, experience, knowledge and capacity of civil society to act. The *Associação Cultural Moinho da Juventude*, established and run essentially by migrants and their descendants, has an intervention experience of approximately four decades in the neighbourhood of *Cova da Moura* through community intervention, with a particular focus on the education and training of children, young people, adults and seniors. This work experience translates into an intervention characterised by the singularity of its purposes, principles, organisation and functioning, working methods and lexicon, thus falling within the scope of ‘micropolitics’ (Guattari & Rolnik, 1996).

Moinho's micropolitics stems from its critical approach to the hegemonic strategies and processes. In this sense, *Moinho* seeks to promote global and integrated interventions, based on the experiences, knowledge and culture of the neighbourhood's residents. The recognition of residents' experience and knowledge, the training of experts by experience and the work in tandem are *Moinho* initiatives that bring to light new approaches to intervention in relation to what has been instituted, thus rendering them singularisation processes (Guattari & Rolnik, 1996). This singularisation process, triggered and implemented by the residents of the neighbourhood, aims to promote training geared towards a critical conscience and spirit (Freire, 1980), as well as to vindicate transformation of the dehumanising structure (Freire, 1980). *Moinho*'s initiatives are driven by the pursuit of *conscientization* (Freire, 1980) focused on observation, analysis and transforming action towards a fairer world, thus constituting adult education processes themselves. Its intervention reveals the importance of interdependence and

complementarity between public policies and micropolitics. The micropolitics that has produced and guided its intervention for almost four decades has fostered the emergence of counter-hegemonic logics to (re)consider the city, the right to the city, the right to a place, and the intervention in self-produced territories inhabited by immigrants and their descendants.

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

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Towards a post-humanist design for educational inclusion: Proposing a study pedagogy for litter polluted critical zones

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Abstract

In this contribution to the special issue on adult education, inclusion and justice we discuss how an inclusive pedagogy can foster a more just way of inhabiting litter polluted living environments, in which the interests of both human and non-human dwellers are taken into consideration. More precisely, we theorize how arts can function as study material and enable a collective sensitivity for the ways in which (non-)human entities (e.g., fishermen, seals, birds, litter pickers, tourists, plastic producers) constitute a 'sick' habitat. Based upon our theory-driven participatory action research with adult inhabitants of the litter polluted Belgian coast, we conclude that a study pedagogy has the power to constitute collective events of emancipation in which inhabitants of damaged living environments can start to inhabit these places, i.e., they become (more) attentive to the reciprocal relationships with other human and non-human entities and respond accordingly with care towards these entanglements.

Keywords: sustainability education, socioecological justice, critical zone research, study pedagogy, community arts

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Introduction

In this contribution we propose a post-humanist approach to non-formal initiatives with adults, geared at constituting a world that is more just for all. More precisely, we theoretically develop a form of adult education that can be regarded more inclusive compared to existing discourses which are human-centred and which are mostly limited to formal learning contexts. We do this based upon our theory-driven participatory action research at the litter polluted Belgian North Sea coast. During this research project we focused on the issue of anthropogenic litter pollution, which is broadly considered as one of the major global challenges that we are currently facing (Popa et al., 2022). Caused by increased plastic consumption and poor waste management, it influences the livability of oceans and beaches worldwide, including the North Sea (Falk-Andersson et al., 2019). Scholars suggest that in order to find a way out of this deadlock, there is a need for educational initiatives in which local inhabitants, of all ages, collaboratively investigate the litter pollution in their environment (Ammendolia & Walker, 2022).

However, in existing literature on education and ecological justice, much attention has been paid so far, first, to the role of schools and universities, i.e., formal education. The underlying idea is that young people should be equipped with the right knowledge and skills in order to become the sustainability stewards of the future (Amsler & Facer, 2017; Holfelder, 2019). Second, the conceptualization of justice in educational research has for a long time only included the interests of human beings (Goodwin & Proctor, 2019). As a response to the first tendency, educational scholars like Casey & Asamoah (2016) and Pritchard & Gabrys (2016) have increasingly begun to underline the pivotal role of non-formal adult education due to the high urgency of issues like anthropogenic litter pollution. Their argument is that we cannot wait for formal education to prepare future generations. Moreover, people of all ages are considered to have a stake in current sustainability challenges and therefore *all* generations have to be mobilized. This growing attention for non-formal adult education is mainly reflected in a body of research and policy texts on lifelong learning in communities where access to formal education is less evident (Aguayo & Eames, 2017; UNESCO, 2019). As a reaction to the second tendency, new perspectives have started to question the taken-for-granted hierarchy between humans (as active agents) and non-human entities (as the mere natural background of human action). This so called 'post-humanist turn' in educational research has integrated ecological concerns and animal rights in order to include multispecies entanglements in educational initiatives (Aedo et al., 2019; Griswold, 2017)

Situating ourselves within these two emerging bodies of literature and building further on the work done by philosophers Bruno Latour, Isabelle Stengers and pedagogues Hans Schildermans and Jan Masschelein, we introduce a new understanding of *emancipation*. One that goes beyond the classical idea that it is merely situated within the social, human sphere. More exactly, based upon our theory-driven empirical work, we suggest an alternative, post-humanist approach to emancipation in which there is (1) more attention for justice beyond human interests and (2) in which the aim is not to get liberated from restraining social, cultural, economic or ecological bonds, but instead to become more receptive of our (non)human attachments (Latour, 2005). Doing this, we want to draw attention to adult educational initiatives in which local inhabitants collectively learn to *become-with* the forms of life that dwell in their habitat. We henceforth introduce the concept of *inhabitation*, which describes the process of becoming ever more attentive to one's entanglements with other human and non-human entities and to respond to these new attachments with care.

In the first section of this paper we detail how we developed what we will call 'requirements' in order to artistically visualize and collectively study the litter pollution of the Belgian North Sea. In the second section we show in which way these requirements were operationalized in a *study protocol* that shaped the *public study experiment* that we conducted with a group of participating adult inhabitants of the concerned area. In the third section we discuss how during this educational experiment particular litter streams were represented by an artistic sculpture and *problematized* during four *study sessions* at the Belgian coast. In the concluding part we show how the deployed inclusive study pedagogy can foster new forms of thriving with (non)human entities in a way that can be more just for all.

Three pedagogical requirements for a Critical Zone Observatory

Based on the work of Bruno Latour and Isabelle Stengers on collaborative research practices, Hans Schildermans argues that specific conditions or rules of engagement are needed, which he calls *requirements*, in order to constitute events of *collective study*. More precisely, the concept of requirement points towards carefully designed and assembled tools, procedures and participants, which enable a group of people to collaboratively study an urgent issue in their living environment (Schildermans, 2021). Inspired by the theoretical work done by Latour, Stengers, Schildermans and Masschelein, we decided to collaboratively design, together with local adult inhabitants of the Belgian coast, a *study experiment* on local litter disputes. For this experiment, we built a theoretical framework consisting of three requirements, which we detail in the next section. First, we discuss how we investigated the litter polluted Belgian coast as a *critical zone* (CZ). Second, we explain the pivotal role of arts in rendering people sensitive for the litter pollution in this area, and third, we explain how a process of problematization can reopen existing understandings of the concerned issue.

First requirement: investigating the Belgian coastline as a Critical Zone

Our participatory research at the Belgian coastline (geared at collaboratively designing the study experiment) started from the observation that this coastline can be defined as a sick stretch of territory due to the excessive amounts of marine litter, impacting both marine biota and human health (Falk-Andersson et al., 2019). As mentioned above, the first requirement for the study experiment is to investigate this damaged area as a CZ. More precisely, we draw inspiration from Latour's suggestion (2016) that place-based public investigations are needed in order to arrive at a proper and shared understanding of how a sustainable collective life could look like in damaged living environments. In order to come to an idea of how these investigations could be designed, Latour (2014) draws inspiration from the network of *Critical Zone Observatories* (CZOs) in the US. These are observatories of scientists who aim to understand how entities like trees and rivers in a delineated area interact with human actors. CZs are habitats that are 'sick', because human and non-human entities are affected in their possibilities to flourish (Gaillardet, 2020).

Thinking in terms of CZOs comes with a reinvention of the soil sciences, meaning that several disciplines are mobilized to equip zones like a watershed or a mountain hill with *haptic* instruments in order to fathom the complex processes taking place there (Latour, 2014). Derived from the old Greek word 'haptikos', i.e., to get in touch with something, these instruments function as *interfaces* that help people to get in touch with different forms of life outside oneself and the way how the self and the world are being

mutually shaped (Swillens et al., 2021). In CZOs people map and represent, with the help of instruments, the complex flows of entities present in the concerned area. In this way, through haptic interfaces, people can become sensitive to how their entanglement with non-human forms of life influences the liveability of the investigated place (Latour, 2014).

Moreover, this entails that one starts experiencing one's living environment as a *habitat*. This stands opposed to the classical discourse on inclusion in which the natural environment is seen as the mere background or stage scene for human action, against which human history takes place. Justice is then situated in what is regarded as the only relevant sphere: the social (Aedo et al., 2019). In his work on global challenges like mass migration and climate change, Bruno Latour (2017) states that ecological issues (e.g., anthropogenic litter pollution and climate change) are always *socio-ecological*, meaning that the struggle for social justice and for taking care of our natural environment are not separate endeavors. Instead they are two sides of the same coin. Hence, if we aim to engender an hospitable North Sea coast, we have to move towards more inclusive ways of deliberation in which the conditions for a decent life for both human (e.g., fishermen, tourists, coastal inhabitants) and non-human entities (e.g., fish and sea mammals) are considered. For this to happen, however, it would be essential to first investigate how the Belgian North Sea coast consists of multispecies struggles for individual and collective survival and how litter pollution affects this.

Henceforth, speaking about a habitat as a CZ implies seeing an area as a territory in which human and non-human entities try to thrive and where there is no a priori correct understanding of what a just way of living together entails (Latour, 2018). Habitat derives from the Latin word 'habitare' (to dwell). As such, it emphasizes the active and never ending process of building a livable haven. What the concept of CZ adds is that all forms of life (human and non-human) are interdependent for their survival. Any attempt to fully detach from local (non)human bonds therefore results in a loss of sense of really inhabiting a place. When local inhabitants are encouraged to investigate an ecologically damaged area as a CZ, they thus have to do this from *within*, as concerned and attached inhabitants and not from a seemingly neutral distance, deploying an objectifying gaze (Tresch, 2020).

Second requirement: art and creating matters of concern

A second requirement that we installed is to experiment with *artistic* creations and interventions that function as haptic interfaces. According to Latour, the *aesthetic* efficacy of arts consists of its capacity to creatively draw various flows of humans, animals, plants, stones, water etc., dwelling in a CZ, into a material representation that can start to matter to people (Latour, 2015). Building an artistic installation can be especially effective when mapping and representing a complex assemblage of litter streams that are highly dispersed in both time and space. Think about fishing nets trapped in ship wrecks, plastic bottles going with major ocean streams and degraded microplastics being buried in the sand. These characteristics of litter put our thinking capabilities to the test and exceed what is considered possible to understand, especially when our own existence and that of animals is tied into litter fluxes. Art installations in this regard can help to become attentive to details and contrasts within such complexity and to challenge our existing perceptions of the world.

In addition, arts have the aesthetic potential to transform *matters of fact* into *matters of concern* (Latour & Weibel, 2020). Matters of fact are artificial constructions of reality that are expected to indisputably speak for themselves. This results from ignoring the

complex assemblages of human beings, procedures and (scientific) instruments that are required in order to construct a (scientific) fact (Latour & Woolgar, 1979). More precisely, these facts are presented as universal truths and in that sense not grounded in the reality of problems that they represent. Matters of fact are thus regarded as claims that are obvious and indisputable and therefore often used to shut down deliberations about an issue (Latour, 2008). In contrast to a matter of fact stands the construction of matters of concern, which

> [i]s what happens to a matter of fact when you add to it its whole scenography, much like you would do by shifting your attention from the stage to the whole machinery of a theatre…. Instead of simply being there, matters of fact begin to look different, to render a different sound, they start to move in all directions, they overflow their boundaries, they include a complete set of new actors, they reveal the fragile envelopes in which they are housed (Latour, 2008, p. 39)

Matters of concern put matters of fact to the test as they start to form a complex of disputable issues (Latour, 2004). Arts in this regard can function as a haptic interface as it has the ability to stage and create a sensitivity for the 'whole machinery' around a problem (Latour, 2008). More concretely, arts can represent in a creative way how human and non-human actors are intimately entangled around socioecological problems like anthropogenic litter pollution. The visualization of these entanglements through arts re-opens matters of fact by allowing new actors to overflow and complexify existing representations.

For Latour a matters of fact approach leads to *objectivism*, i.e., the shutting down any further deliberation. Opposed to this stands the concept of *objectionism*, which refers to the process of allowing for as many objections as possible towards prevailing understandings of a problem (Latour, 2018). In this way, complexity is added to facts that otherwise appear as neutral, trapping us in a cycle of deathly repetition (Guattari, 1989). Making art, hence, becomes a matter of composing and forging new links between entities that were previously considered non-existent (Felski, 2015).

Third requirement: problematizations through propositions

A third and last requirement of this CZ research at the Belgian coastline is to foster *educational* inclusion by collectively *problematizing* a matter of concern. In the work of Latour, political inclusion mainly plays a crucial role in deliberations about which forms of life we want to protect (e.g., declining seal population) and which ones to fight against (e.g., industrial fishing industry). In politics, as Latour wants it, one represents an existing voice and takes a predefined position in order to protect a form of life that is in need of defence (2017). The problematization of the relationships between these forms of life, by collectively studying it, is in this regard considered less relevant because one merely has to defend existing positions. However, based on the work of educational scholars like Hans Schildermans (2021) and Jan Masschelein (2019), we advocate for the relevance of fully disentangling how the complex interweavement between (non)human entities causes a habitat to become sick. This implies that one not just visualizes the whole machinery behind a matter of concern, i.e., the complex entanglement of human and non-human entities constituting a litter related problem, but that one also *problematizes* these interrelations, i.e., one reopens and reconsiders them among a public of involved stakeholders (e.g., Schildermans, 2021). Such a *study pedagogy* consists of practices of collective inquiry wherein people (experts and non-experts alike) are brought together and start to investigate a problem, but where they do not immediately have to come up

with either technological solutions or political statements as it the case in purely political deliberation. The word study thus hints towards a slow and collective thought process *whilst* constructing matters of public concern (Swillens & Vlieghe, 2020).

What is at stake here is to engender inclusion in a *pedagogical* way, rather than a political one, i.e. to foster an attention towards one's entanglements with other human and non-human entities and to respond to these new attachments with care. This can be supported by the formulation of what Masschelein (2019) and Schildermans (2021), building further on the work Isabelle Stengers, call *propositions*. These concern incitations that are offered to others for consideration or acceptance, i.e., proposing new ideas for reflection or action without expecting the other to immediately take a political position. Instead, the goal is to allow for an attentiveness to emerge and to approach a matter of public concern in a nuanced, objectionistic way. More precisely, concrete *study materials* (like art installations, documentaries and maps) can foster the formulation of such propositions because these artefacts visualize and make present new dimensions of a problem, potentially *objecting* seemingly obvious positions. Propositions are in this regard not at the same level of mere opinions or political claims, which are inseparable and directly linked to a person or a group.

In what follows we discuss, based on our empirical data (interview transcripts and observations), how a socio-ecological problem can be turned into a matter of concern. And how with the help of such a study pedagogy a post-humanist educational approach to inclusion can be fostered. For this, the first author of the paper worked intensively together with a group of adult inhabitants living near the Belgian North Sea coast, e.g., fishermen, beachcombers and animal activists.

Creating a matter of concern with the help of litter arts and a study protocol

Based upon the three formulated requirements, we designed the pedagogical study experiment in collaboration with adult inhabitants of the Belgian coast. More concretely, during a period of a year, we transformed disputes among opposed stakeholders like fishermen and seals guardians, all related to litter pollution, into a matter of public concern. For this we deployed an art installation that we made from locally collected litter. Put shortly, during the *first* phase of our participatory action research, and as a preparation for the later study experiment, we traced how human (e.g., fishermen, animal rights activists) and non-human actors (e.g., seals, fishing vessels) are intimately entangled with litter pollution disputes in the concerned CZ. The main researcher did this by conducting walking interviews on the Belgian beaches. Subsequently, during the *second* phase, we discussed these traced frictions and decided, together with a diverse group of local inhabitants, to focus on one urgent issue, i.e., the death of seals by specific marine litter resulting from fishing activities along the coastline. With this specific matter in mind we designed and built, in the *third* phase, an art installation (as haptic interface) in order to represent the complex variety of litter streams caused by the fishing industry. During the final, *fourth* phase, we finally designed and conducted the public study experiment. Hereby these litter streams (and its impact) were problematized (via the art installation) among a public of local adults, e.g., fishermen, animal rights activists, tourists, nature guides.

First phase: tracing litter disputes

With the help of a notebook, the main researcher initiated the first phase of the participatory action research by conducting a dozen walking interviews on the beach with beachcombers (local people who regularly clean the beaches), a local fisherman and animal rights activists.

Starting from the requirements outlined above, we traced and inventoried the concerns that these people articulated about the litter pollution of the Belgian North Sea. Gradually it became clear that frictions exist around the pollution caused by the fishing industry along the North Sea coastline. In particular the death of sea mammals due to drifting fishing litter (e.g., ghost nets and hooks), was mentioned as an urgent and controversial concern. Animal rights activists especially pointed towards the injustice (e.g., decapitations) to the growing seal population in the North Sea. At the same time, fishermen appeared to feel solely blamed for the marine litter pollution in their fishing grounds, despite their recent efforts to bring litter back ashore.

Second phase: slowing down militancy

Following these explorative interviews, we publicly addressed the issue for a first time during an explorative workshop in the major coastal city of Oostende. The goal of this event was twofold: (1) to come to a substantive starting point for the collaborative enquiry and (2) to gather a group of adult volunteers for the planned collaborative enquiry on the problems caused by the polluting fishing industry at the Belgian North Sea coast. More precisely, around thirty local inhabitants responded to an open call on social media and came to the event, where they were asked to brainstorm in which way problems related to marine fishing litter could be further investigated. More concretely, we asked the attending beachcombers, fishermen and animal rights activists to first discuss the traced frictions into small groups after which we would plenary try to come to a shared starting point for the collaborative enquiry.

During the plenary session, it appeared that fishing nets at the Belgian coast are strongly related with a great variety of entities like fishermen, seals, local, regional and national lawmakers, beachcombers and animal rights activists. It was emphasized that these nets have a negative impact on the growing population of seals, but that professional fishermen increasingly try to tackle the problem. However, still many questions remained. For instance about the specific types of damaging fishing nets and the precise role of the Belgian fishing industry in the pollution. An indication that it might be too early to bring the matter into the political realm, i.e., representing harmed entities (e.g., seals) and deciding about more sustainable ways of living together. The reason was that the complex interweavement of human and non-human actors surrounding the problem was not yet fully clear, which is crucial if one wants to engage with the problem in a proper way.

Despite these uncertainties, some of the attendees demanded immediate action and proposed to go on the streets to march for a more sustainable North Sea. This is an illustration of what Isabelle Stengers would call an urge for *mobilization* (Savransky & Stengers, 2018, p. 139), i.e., 'to pay no attention, to classify what may slow down as an obstacle'. In these situations, attention for the complexity of urgent matters of concern can be undermined because further questioning is considered to be a waste of crucial time. Such an approach, however, entails that education could be reduced to mere *instruction* i.e., the telling of stories that are too simple. In other words: education is narrowed down to conveying objectifying matters of fact. It was exactly this what we

wanted to avoid and we realized that this urge for mobilization could hinder the further unraveling of the emerging matter in this CZ.

In response to this, the moderator of the evening (the main researcher) asked the attendees if political slogans could also be turned against them, especially if these are not well-funded and well-contested. One of the beachcombers responded as follows:

> Concrete action in the sense of 'we are going to go out on the streets and we're going to demonstrate against the fishing nets' is something I don't want to advocate for. I would rather plea for a further commitment to collect information [about the issue] and only take collective action based upon that information.

A local animal rights activist added that:

> […] we should first get a better understanding of what kind of nets are actually found on the beaches and the link between the different disciplines is very important for this. Only then we can strengthen our current understanding of the problem.

At stake is thus the creative and transformative potential of collective thought. For this, we first had to further investigate the matter before answering questions about which actors should be protected, which to fight against and how to constitute a world that is more flourishing for those currently limited in their thriving (Latour, 2018).

After the discussion about whether to take immediate political action or not, the moderator of the plenary session initiated the idea of constructing an artwork in order to represent the concerned matter, which could help to foster the involvement of a broader public into investigating the issue. One of the beachcombers was not convinced about the usefulness of this and argued that the only real solution would be to keep cleaning the beach with as many people as possible. At the same time, others suggested that by merely doing that, there would be no solution for the cause of litter pollution in the concerned area. An artistic intervention could, as was argued by the moderator and endorsed by some of the attendees, help to involve a broad public of involved actors related to the matter. Without immediately portraying certain groups as guilty, by making bold and objectifying statements, and without lapsing into a too abstract approach (e.g. complex scientific graphs). In addition, it was emphasized by some of the beachcombers that making and sharing pictures of gathered litter (a common practice among beachcombers) was not enough to provoke people into thinking collectively about the problem. Put differently, one could say that the aesthetic quality of arts in evoking a shared, new attention for the problem was touched upon during this discussion.

It is inevitable that some of the attendees were still convinced about the fact that the political way was the only right way and/or that arts is not the best way to tackle problems caused by marine litter. However, these opposing standpoints also helped to better articulate both the importance of slowing down collective reasoning and the role of arts in supporting that process. All this illustrates how the insights from people living within the zone and an external researcher can merge into shared aspirations, which comes close to the essence of participatory action research: building a common understanding of the actions to be undertaken by engaging in collective reflection (Lewin, 1946). At the end of the workshop, we came to the conclusion that if we were going to build an art installation it had to be publicly displayed in the damaged area itself, i.e., on the beach. In this way, those people dwelling in the habitat would be able to contribute to a better understanding of the matter.

Third phase: developing the study protocol and building the art installation

During the months after the workshop, we gathered a group of twenty adult coastal inhabitants with whom we worked on the idea of building an art sculpture that could represent the complex streams of fishing litter harming the growing seal population, e.g., plastic fishing nets, nylon fishing nets, synthetic rope. After a few gatherings in the coastal cities of Oostende and Middelkerke, we decided upon the idea of building a mobile art installation that would depict the Greek goddess of the sea, Amphitrite, and to let her make a four-day long journey along the Belgian coast, passing by four of the most polluted Belgian beaches.

However, merely showing the art installation was considered to be insufficient and we organized a special meeting in order to discuss how we could involve different relevant actors related to the represented matter and to let them deliberate about the problem (e.g., fishermen, divers, aquafarmers, nature guides, beach combers, animal right activists). At this moment we brought in a study dynamics, as detailed in the first section of this paper. More precisely, the main researcher proposed to work with a study protocol, i.e., rules of engagement in relation to the art installation. These rules were inspired by the three requirements outlined above and were aimed at representing in a creative way the complex entanglement of fishing litter in this CZ and at investigating collectively the problems caused by these litter streams.

More precisely, the goal was to foster the formulation of *propositions* in relation to the art work, which accordingly could start to function as study material. In this way, new propositions could object existing understandings of the investigated matter of concern. After a long deliberation we finally decided upon the following study protocol:

1. Universal claims and generalizations about global litter pollution should be avoided because these run the risk of not being concerned with the marine litter streams in the investigated zone. For this, the art installation should only be built with local litter objects. And during the studying, every articulated proposition should relate immediately to these represented litter streams and stem from one's own relationship towards it. Only in this way, the problem can be studied from *within* the selected CZ itself.
2. During the making of the artwork, as many relevant litter streams as possible should be represented in the installation. In addition, during the collective study event, as many of the affected forms of life should be represented by spokespersons in order to object a variety of existing positions. More precisely, in order to make study sessions as inclusive as possible, we decided that all affected actors are to be represented by at least one spokesperson. We accordingly came up with a list of those actors who had to be represented: (a) sea animals, (b) the maritime industry and (c) coastal inhabitants.

After we agreed upon these rules, we decided to organize four *study sessions* of about an hour in which the invited spokespersons (seventeen in total) would engage in one of the sessions in order to collectively study the represented matter. Doing this, both human and non-human actors could be included in these educational deliberations. The artwork and the designed rules of engagement thus form a haptic interface that supports the formulation of propositions in relation to the concerned matter. In addition, by not allowing for the articulation of mere opinion and universal claims, the tendency to talk *about* or to speak *for* another is slowed down. Instead, one is invited to take part in a risky

process of thinking *with* and in *the midst of* the presence of other, represented (non-) human residents (Savransky & Stengers, 2016).

Fourth phase: studying on the beach

In the last phase, after several preparatory summer session, during which we built the art installation and invited the spokespersons to act in line with the designed study protocol, we kicked off the four day study initiative at the end of the summer. The building process of Amphitrite was supervised by a local artist and her close friend who have been artistically experimenting with litter objects in the past. Both women also turned out to be crucial gatekeepers to local communities of fishermen and aquafarmers. Many of the invited spokespersons either had been directly invited by them or by the main researcher, always using a reference to the two gatekeepers. This made a significant difference because the topic of litter pollution is highly contested at the Belgian coast. As discussed earlier, local communities of fishermen are often portrayed by the general public as stubborn polluters and the mutual trust between the two women and their community was therefore paramount.

The four day event started with a study session at the polluted main beach of the coastal city of Nieuwpoort. Three more of these sessions followed in that same week: one in Westende (second day), one in Middelkerke (third day) and one in the major coastal city of Oostende (fourth day). We deliberately chose for the summer months, because many tourists would flock together on the beaches, and they might attend the organized activities. In order to explain the set-up of the study sessions towards the public on the beach, a group of volunteers accompanied the mobile art installation (see figure 1), before the activities would begin.

During the four public study sessions, local divers, industrial fishermen, official scientists, seal guardians, beach combers, aquafarmers, amateur fishermen and nature guides were invited to act on the beach as spokespersons. This always happened in front of a public of tourists, invited politicians and interested people who read about the project in local newspapers and on social media. All four sessions were moderated by the main researcher and they started by asking the spokespersons to detail which of the represented litter streams they recognized in Amphitrite and how these influence or are influenced by the actors that they represent. In that sense, the moderator acted as a *diplomat* towards the dwellers of this CZ, i.e., diplomats ‘are those who do not address humans in general but humans as attached, as diverging, and they need to have protagonists presenting themselves together with these attachments’ (Savransky & Stengers, 2018, p. 142).

Figure 1. A group of local volunteers accompanying the art installation and engaging with visitors of the beach (authors' own figure).

Results of the study experiment

During the building process of the art installation we intensively discussed about which type of litter streams are important in relation to the investigated matter of concern, i.e., the death of seals caused by the fishing industry. In order to have as many of the damaging litter streams present in the artwork (one of the rules in the study protocol), we consulted three relevant organizations situated at the Belgian coast: Fishing for Litter (fishermen who try to clean up the sea), Proper Strand Lopers (beachcombers who voluntary swipe the Belgian beaches) and NorthSealteam (volunteers who guard the Belgian seal population). Based on these consultations we selected a variety of fishing nets (e.g., models for catching shrimps, trawler nets and wrangle nets), but also hooks and floaters, all made from a variety of materials like nylon, plastic and cotton.

The artificial concentration of these litter streams within one single art installation (as haptic interface) enabled the spokespersons to get in touch with these varied litter objects. In addition, the study protocol, with its rules of engagement, transformed the artwork into material that could be collectively studied. More precisely, and as we will detail below, it made it possible for those present to (1) weave new dimensions of actors (both human and non-human) into the represented litter issue (see section *Interweaving litter streams and actors in time and space*) to (2) collectively problematize these new dimensions via propositions (see section *Problematizing existing positions*) and to draw rich and robust sketches of the studied problem (see section *Drawing new sketches of the concerned matter*).

Interweaving litter streams and actors in time and space

During the first study session, in the coastal city of Nieuwpoort, a local diver pointed towards a particular type of fishing nets that was represented by Amphitrite, i.e., trawler nets, and described how he regularly encounters these near old shipwrecks. He explained that the material for these nets is very strong and that divers could get stuck due to their heavy gear. By sharing this anecdote the diver enriched the portrayed image of the deliberated litter stream. More precisely, as a spokesperson of the diving community in this CZ, he wove a new *spatial* dimension into the represented matter of concern, by telling about the unsustainable situation underneath the water level, caused by trawler nets. For many people, this new dimension is something that they do not get in touch with due to the inaccessibility of these ship wrecks. Within this spatial dimension, under the water level, the litter stream of trawler nets got intimately interwoven with sunken ships and the community of local divers. A local fisherman responded to this anecdote by explaining that nets sometimes get stuck in these wrecks and that often there is no other choice then to cut these, otherwise their vessel might capsize. *Weaving acts* like these, as Donna Haraway (2016) calls it, have the force to bring together a variety of truths within a shared present, adding new dimensions to socio-ecological issues.

However, these weaving acts not only occurred in space but also in time. More concretely, during the study session at the beach of Westende (second day), two amateur fishermen, who fish very closely to the shore, detailed how in the past many local fishermen intentionally polluted the sea by dumping all their household waste in it - even fridges and old matrasses. This was a reaction to the proposition of an animal rights activist who stated that many of the seals are suffering due to fishing hooks and nets of fishermen (streams represented within Amphitrite). Nowadays, due to strict regulations, intentional pollution is less common among fisherman according to the two spokespersons. However, at the same time, they mentioned how an important increase of tourist litter can be noticed near the shoreline. Think about soda cans, plastic cany wraps and single use plastic toys. As a response to this, the head of the regional animal rescue center suggested that sea animals like the northern gannet and seals take in particles of these degraded litter objects, causing major damage to their guts.

In this way, a spatial and temporal weaving occurred. Actors like divers, old and young fishermen, recent policies and particular litter streams (tourist litter and household waste) became more or less densely entangled with the litter streams represented in Amphitrite.

Problematizing existing positions

During the course of the four day initiative, several people who depend for their livelihood on the North Sea (e.g., industrial fishermen and aquafarmers) were for the first time directly confronted with spokespersons of those forms of life suffering from these economic activities: the head of the regional animal rescue center, a local nature guide and the head of the Belgian seals organization. By describing how seals are exactly suffering from particular marine litter streams and by articulating what these animals might need for their survival, these non-human dwellers started to become highly present in deliberations about the sick condition of the concerned CZ. Below, we present a short fragment of the last study session in Oostende in which a local fisherman and a seals guardian intensively deliberated the harm caused to seals by the industrial fishing industry. Interestingly, the local fisherman used the artwork in order to object the position

taken by many animal rights activists, i.e., that Belgian fishermen's nets cause major damage to the Belgian seals population.

Excerpt from transcribed study moment, Oostende (Day four):

> *Seals guardian*: We regularly see seals washing ashore because they have a net around them ... they come to rest or to die with us.
>
> *Fisherman*: We actually come across nets like that [points to a type of net in Amphitrite], these are nylon tangle nets. This is the French type and these are actually very sharp. As you can see, they have a different structure compared to the other nets in the sculpture. You can compare these nets to fishing lines that cut murderously.
>
> *Seals guardian*: Yes it is often said that the fishermen are very negative towards the seals, but we have noticed in the last few days that the fishing industry is seemingly becoming more alert and also wants less litter pollution in order to protect the seals. But of course, there are still these nylon tangle nets in France and seals can still get hurt there and wash up or come here to rest. So for seals too, it is important to look internationally and not only at our little piece of Belgium coast.
>
> *Fisherman*: Yes, the sea has no borders. First of all … a lot of litter travels through other fishing grounds and unfortunately we are not always allowed to go there and to take the litter with us. Therefore, working together across borders is really important. When we are fishing here, we have rules, but a few kilometers across the border it is suddenly different. You know, for us fishermen it is sometimes very difficult to deal with these changing local regulations. We want fish to be healthy and I don't want seals to suffer due to our fishing activities. That is why I would want to say: be attentive to the efforts that the Belgian fishing industry wants to undertake and try to support this. Also, the collaboration among different stakeholders is crucial because only together we can be strong in this.

This fragment illustrates how a spokesperson of the seals is confronted with a *proposition* formulated by a spokesperson of the professional Belgian fishing fleet. In this particular instance, the fisherman used the art installation as *study material* in order to shape his proposition about the French fishing fleet, which accordingly functioned as an *objection* towards the position taken by several animal rights activists. The spokesperson of the seals replied by formulating a new proposition, suggesting that marine litter cannot be contained within existing national borders. Due to the interweaving of a new relevant actor: French fishermen's nylon strangle nets, a redefinition of the problem occurred at that particular moment. This process did put existing reasons to the test of newly emerging dimensions, forcing the spokesperson of the seals to respond towards what had been left out in the formulation of the problem (Stengers, 2021).

By responding as a *studier*, i.e., considering the proposition in relation to the study material, and taking care of the emerged dimension, the *problematic* could become actualized (Deleuze, 1994). More precisely, the seals protector decided not to understand the problem as it is usually formulated by animal right activists (the way a militant would do). Instead, she added a new dimension to it and became open to potential ruptures in her own thinking. In this way, she stayed close and attentive to the problem (Haraway, 2016), creatively opening the present view, in which a response was demanded, without others determining what this had to be (Schildermans, 2021). Accordingly, by considering the proposition of the fisherman, a process of problematization was fostered among those present, making the existing story about the death of seals more *interesting* (Savransky & Stengers, 2018), i.e., in the original Latin sense of the word: a shared (inter) reality (esse). It is important not to confuse these moments of multispecies proximity with a state of *unity* in which the differences between forms of life are seen as an obstacle to be overcome (Braidotti, 2019). Instead, by engaging with the matter in an *educational* way, i.e.,

studying the newly emerged dimension, it became possible for the spokespersons and the public to start experiencing a dense present in which existing ideas about litter pollution were put to the test (Stengers, 2021). Doing this, the differences among co-inhabitants are approached as a source of relational knowledge and mutual transformation.

Drawing new sketches of the concerned matter

By collectively problematizing over four days the precise definition of what litter pollution is and in which way different actors are involved, *richer* and *more robust* sketches of the issue were drawn. More concretely, these sketches became more *rich* by encapsulating an ever growing amount of actors and more *robust* by problematizing the relationships between these actors. However, new sketches inevitably also evoked other questions to be studied (Savransky, 2021), triggering even more configurations across time and space.

But at a certain moment, closure has to be achieved. At the end of the last study moment in Oostende we presented the conclusions of the consecutive study sessions towards a group of local inhabitants and politicians. The aim of this act was to publicly present the newly drawn sketch of the studied matter in front of a public who could take action with the refined and collective problem analysis in mind. Doing this, the goal was to show how deliberations can be more *inclusive* towards non-human actors like seals and foster a more rich and robust sketch of an urgent problem: enabling a shared, *objectionistic* view on the matter. However, there is always the lurking risk that these fragile, newly composed analyses become reduced to bold matters of fact, serving as simple political statements. This in fact happened when a journalist of a regional television channel interviewed the main researcher and a local politician right after the end of the last study session in Oostende. The journalist was persistently steering towards the need for higher tax on plastic waste and by editing the footage in particular ways, the interview was instrumentalized for mobilizing the general public towards this particular idea. For the participants of the event, this stood in sharp contrast with the collective and hesitant formulation of arguments during the study session of that same day. More precisely, there was a general feeling among the volunteers that the urge for mobilization by this journalist had created a story about the litter pollution that was cut much too short (Savransky & Stengers, 2018).

Conclusion: inhabiting the Belgian coast by becoming studiers

With the help of the formulated rules of engagement (*study protocol)*, as well as the art installation (as *study material)*, education was brought to the centre of public deliberations in this sick habitat. We did this by excluding the idea that unambiguous answers exist and allowing for collective moments of *problematization* through which existing assumptions could become undefined again. The invited spokespersons were thus approached as *studiers* and not as militants. By building Amphitrite as artistic *haptic interface,* a shared attention for specific litter streams was cultivated, rendering the different spokespersons sensitive for how their living environment is influenced by these litter streams. By collectively studying these streams, both in space and time, the involved spokespersons (as studiers) shaped a new, common sense of the investigated problem. Crucial in this was the role of the art installation, which functioned as a crowd of interconnected litter streams, with which the studiers forged new links across time and space (Felski, 2015).

In addition, with the help of the designed study protocol educational events, in the strong sense of the word, could emerge in which 'all protagonists become more intelligent because of the others, together with others, all actively learning about the kind of world they live in' (Savransky & Stengers, 2018, p. 139). Local inhabitants started to collectively learn to become-with the actors that dwell in their habitat. It is to such a process that one of the volunteers pointed after the four day event ended:

> Participating in the project made me feel very involved with my living environment. A kind of involvement with more than just the people in one's immediate surroundings, also with the wider world than that one of myself... you start to see more and more the consequences of litter pollution. So your view actually gets broadened the more you hear and see. Instead of the narrow understanding of 'my beach', it opens it to a bigger picture of our living environment.

However becoming with other actors in one's living environment doesn't merely implicate getting more attached, but also requires a response to these new attachments. It is this what another volunteer of the project emphasized when interviewing her after the project:

> I certainly take with me that it is important that we, as seal guardians, should make the connection with marine litter pollution. After the project, I look at the flood line differently… one starts to dissect more and more things in the environment. For example, this weekend at the beach I started collecting all kinds of marine litter like a balloon and pieces of fishing nets. I'm going to put all that in a tube and take it with me when I'm monitoring the seals so I can explain about this.

To articulate what happens here we must introduce the concept of *inhabitation* (Swillens et al., 2021). This regards the process of becoming ever more attentive to our entanglements with other human and non-human actors. During this process we also start to respond more carefully to these attachments. Inhabiting a living environment thus means to dwell on a soil to which one belongs ever more, but that belongs to no one in particular. When starting to inhabit your living environment, new attachments are being forged and the idea of a human-centered, detached criticism towards litter pollution doesn't make sense anymore. Instead, adults living in the investigated CZ collectively made sense of what might be possible for this habitat in the future, taking into consideration the stakes of other actors in the territory. Crucial is that this happened from within, i.e., as attached and concerned studiers. It is what Donna Haraway (2016) describes as a becoming *response-able*: making thought creative in new ways of living together other than those that are being considered as unavoidable or obvious.

All this has major implications for the issue from which we started, viz., how more inclusive ways of deliberation in non-formal adult education can contribute to a more just way of living together in litter polluted CZs. Existing literature on adult education and justice often conceives of inclusion in terms of emancipation that is situated merely at the social and human level. More precisely, emancipation is seen as the liberation of oppressed people from social, cultural and economic bonds that restrain them. In this way, people can start to participate fully in society. Based upon the pedagogical experiment that we conducted at the Belgian North Sea coast, we suggest that studying in CZs, with the help of constructing an artwork, has the force to effectuate a different form of inclusive justice in which all people can become ever more receptive to their (non)human attachments. Such a growing sense of attachment cannot be reduced to the acquisition of new knowledge about litter pollution and its impact. On the contrary, and as illustrated by the two participants above, it is in the first instance an *ontological* transformation of

the self as a caring inhabitant of an ecologically damaged and socially unfair world. Emancipation is accordingly to be understood as a collective making and remaking of our relationships with the environment we are dependent from, while at the same time being aware of our reciprocal entanglements with other forms of life (Latour, 2015). All this entails that if we want to design inclusive educational experiments that can contribute to a more just world for both humans and non-humans, we only can do this by taking people in sick habitats, of all age, seriously in their ability to become studiers and to think beyond human-centered and universal statements about justice.

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Teachers' approaches to teaching for social inclusion in second language education for adult migrants

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Abstract

Adult education has been used as a means to enhance citizens' opportunities to participate and be included in society, but adult education may also construe students as excluded. This study focuses on how teachers in second language education for migrants conceptualise and enact teaching for social inclusion. It draws on Fraser's concept of social justice and Biesta's aims of sound education. The article is based on observations and interviews with teachers. The findings highlight that the teaching is enacted to develop the students' language skills for formal qualification and everyday life as well as their knowledge of Civics and norms in Swedish society. Thus, conceptualising the students as emerging participants, lacking skills and knowledge as language users and citizens. This teaching enactment reflects qualification and socialisation as central aims of education, but less of subjectification processes. Consequently, social inclusion is conceptualised as migrants adjusting to society in predefined ways.

Keywords: social inclusion, adult education, second language teaching, teachers' approaches

Introduction

In the Nordic Welfare state model, as represented in Sweden, Denmark, and Finland there is a long tradition of adult education as a means to enhance participation and inclusion in society (Kuusipalo et al., 2021). Social inclusion, however, has been used as a concept with various agendas over time, both as demands for social rights and as a justification of

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social and moral regulation of individuals to adapt and contribute to society (Spandler, 2007). Participating in adult education does not, per se, lead to social inclusion. Adult education directed toward specific groups to meet societal expectations for example by being active and self-supporting (Fejes, 2010) reflects how education implies moral regulation. Furthermore, students are construed from a deficit perspective (cf. Kloubert & Dickerhoff, 2020). Previous studies have further problematised how students within adult education are conceptualised from a deficit perspective which may infantilize the students and exclude rather than include them (Franker, 2007; Hoffman et al., 2021; Wildemeersch & Koulaouzides, 2022). Given the vagueness and the paradox between social rights and regulations that are underlying the use of adult education as means of social inclusion, we investigate teaching for social inclusion in, second language education of adult migrants.

Second language education for migrants has been seen as a key to social inclusion and as a sign of migrants' willingness to adapt to the new country (Ahlgren & Rydell, 2020; Blackledge, 2009; Rosén & Bagga-Gupta, 2013; Rydell & Milani, 2020). However, being included in a new country is also dependent on the access one has to communities where the language is spoken (Dahlstedt et al., 2021). Our analysis, therefore, draws on an understanding of social inclusion that comprises rights as well as redistribution of resources needed to participate, representation in different social contexts as well as recognition (Fraser, 2005).

This study examines Swedish for Immigrants (SFI), the formal introductory language education for adult migrants. Since SFI was founded in 1965, it has been seen on the one hand from a humanistic perspective, facilitating migrants' participation in society, on the other hand, from an instrumental understanding of second language education as a way to reduce the time it takes for migrants to establish in Swedish society and more specifically the labour market (Lindberg & Sandwall, 2007) SFI, therefore, is expected to be an efficient education in terms of student intake and completion rate, and to meet the various backgrounds and needs of a heterogeneous group of students.

The curriculum of SFI states that the purpose of education is to develop students' language for participation in work, further studies, life within society, and everyday life. Moreover, linguistic goals are stipulated in the syllabus, but the content and methods are less specified (cf. The Swedish National Agency of Education, 2018). This enables the teachers to make their own pedagogical choices when interpreting how to enable students' participation. Our research interest lies with teachers, who enact SFI education through their teaching. This study aims to examine how teachers conceptualise and enact teaching for social inclusion in second language education for adults. We ask the following questions:

- How is SFI teaching enacted for enabling social inclusion?
- How is social inclusion through adult second language education conceptualised by the teachers?
- How are SFI students conceptualised in relation to social inclusion?

Second language teaching and social inclusion

Previous studies of the second language teaching of adults have included aspects of how the teaching can include or exclude students. One research aspect is how second language teaching connects to the students' everyday lives and life within society. There are examples of how second language teachers consider the students' contexts in their teaching (e.g. Colliander et al., 2018), but also of how little consideration is given to what

the students bring into the classroom. The latter implies that students' opportunities to link their everyday literacy practices to the literacy practices in the classroom are limited and, therefore, that they cannot connect things they learned in their studies to activities outside school (Norlund Shaswar, 2014). Moreover, international studies, and studies of the Swedish SFI alike, show that to support migrant students' participation in society, the teacher must be learner-centred and integrate the students' everyday lives with their abilities to exercise their citizenship (e.g. Slade & Dickson, 2021; Wedin et al., 2018). Nonetheless, studies of SFI students show that students' opinions about the teaching are not acknowledged (Carlson, 2004), that their cultural backgrounds and experiences are not much considered (Lundgren, 2005), and that there are few authentic questions directed toward them (Colliander & Fejes, 2020).

The use of language in teaching is another issue that can either include or exclude students in the educational setting. There are examples of how students' multilingual abilities are being acknowledged as a resource in teaching (cf. Rosén & Bagga-Gupta, 2015; Wedin et al., 2018); however, the idea that students' multilingual interaction prevents them from learning a second language sustains a monolinguistic norm in many classrooms (Rosén & Bagga-Gupta, 2015; Rydell, 2015). Moreover, the opportunities for students to speak the target language during the lessons are central to their language learning process. By conducting more of the teaching activities in smaller groups rather than in the whole class, the students would be given a greater oral space (Norlund Shaswar & Wedin, 2019).

Teachers' approaches to second language students also condition the opportunities for inclusion. Cowie & Delaney (2019) illustrate how, in classroom practice, information about the host country's society can be presented either as facts and with language development as the main purpose or carried out intending to encourage the students to ascribe to certain values. When focusing on adjusting the students to the new country, teachers can limit the students' learning agency (Pötzsch, 2020), and language courses which do not live up to students' expectations can be perceived as limiting and patronising, instead of having an empowering effect (Hoffman et al., 2021). Zachrison (2014) shows that students experienced alienation when they used Swedish inside (and outside) the classroom since the teaching was based on a monocultural norm, with greater emphasis on 'thinking like a good Swede' than on 'speaking good Swedish' (p. 230). When representatives of the majority society within, for example, language education do not critically introspect their ideas about culture, learning, and integration, the structures behind exclusion are not challenged (Pötzsch, 2020). Second language teachers have, unintentionally, been observed to infantilise students by underestimating their capacity (Franker, 2007), and teachers, as well as policymakers, have described the students from a deficit perspective, i.e. as weak, ignorant of what it means to be part of the society and, therefore, in need of fostering (Carlson, 2002). These studies show that teaching which positions students as lacking, implies exclusion. In Carlson's study (2002), the students refused the stereotypical descriptions of them as ignorant and vulnerable, and, thus, the fostering intentions acquired a boomerang effect. Through being stereotyped, the students experienced alienation rather than inclusion. Despite these experiences, however, they acknowledged that, through their participation in second language education, they did develop more self-confidence and abilities to act in their everyday lives. Consequently, second language education can work both against and towards students' social inclusion, regardless of the norms behind the teaching.

While Carlson's study was made two decades (in 2002) ago, more recent studies which focus on the Civic Orientation program – a course for newly arrived adult migrants run in parallel to SFI – give a similar picture. Bauer et al. (2023) show that the Swedish

society, in this type of education, was presented, as opposed to the participants' countries of origin, in a non-problematised way and a positive light. Furthermore. Abdulla (2017) and Milani et al., (2021) illustrate that the teaching aimed to socialise migrants to a certain Swedish way of behaving and that the migrants responded differently to these attempts, either by resistance or compliance.

Bacquet (2020) suggests an alternative approach to teaching second language education by facilitating students to engage in practices that encourage them to develop their identities, become empowered, and be able to invest in language learning for the sake of their futures. For example, he suggests that this could be done by teachers creating collaborative relationships with the students to counteract the hierarchy in the classroom, encouraging and supporting students to actively participate in classroom activities as well as in language learning activities outside the school context.

Even if research on second language teaching relates to inclusion, few studies focus on how teaching is organised to achieve the explicit purpose of social inclusion. This question, however, will be addressed in this study.

Analytical framework

As a starting point for this article, we draw on Fraser's (2010) understanding of social exclusion as a social injustice that occurs when society is organised in ways that hinder groups to participate on equal terms. Fraser (1987; 1989) uses the concept of needs interpretation to highlight how societal initiatives aimed toward different groups are shaped by assumptions or ideas about their needs. In this article, we draw on needs interpretation to analyse second language teaching to enable social inclusion based on the teachers' conceptualisation of social inclusion and the SFI students. Furthermore, Fraser (2005) suggests a model based on three dimensions of social justice and possibilities for members of a society to participate as equals in social life. The three dimensions are redistribution (of socioeconomic resources), recognition (of one's interests and ways of living), and representation (to be seen as a relevant member in specific societal contexts). In this paper, we discuss how and if teaching for social inclusion in second language education contributes to the students' inclusion through the dimensions of redistribution, representation, and recognition.

To analyse social inclusion and the specific context of education, we draw on Biesta's criticism of the use of education for specific societal aims. Biesta's (2010; 2018) concept of learnification illustrates how the discourse on learning implies a duty for adults to learn to adapt to society. Learnification enables us to see how teachers conceptualise students' knowledge and needs in relation to goals of SFI and what it means to be included. According to Biesta (2018), learning is a judgment of an event rather than a neutral process of change. There is someone who determines what is desirable to learn and what specific change that is regarded as learning. Säfström and Biesta (2011) argue that education should not be understood as a movement from what is to what is not yet, as an attempt to form the student in a particular way. Instead, one should concentrate on what happens in the tension between *what is there*, and *what is not*, and where the latter is something new and undefined.

Biesta (2010) discusses the potential of democratisation through education and defines three aims of sound education: to qualify students through the development of skills, knowledge, and dispositions, to support their socialisation, whereby humans become a part of different social practices, and to help them form and transform their personalities in the process of subjectification. Through subjectification, students become autonomous by, independently, orienting themselves and driving their actions (Biesta,

2018). Qualification, socialisation, and subjectification are intertwined. However, Biesta (2010) gives the concept of subjectification particular significance. By engaging in democratic processes, inside and outside the school, students develop as democratic citizens, in a subjectification process where they can break into the world and be part of and contribute rather than merely adjust to society (Biesta, 2010). We use the concepts of subjectification, socialisation, and qualification to analyse how teaching enacted in different ways shapes different opportunities for students to be and become included.

Research context and method

SFI, the formal introductory language education for migrants in Sweden, is part of the municipal adult education in which students can complete primary and secondary education. SFI is offered to adult migrants with a residence permit in Sweden. In SFI, there are three study tracks, based on the students' educational background. In Study track 1, students with little or no schooling are enrolled, whereas study track 3 is directed towards students with experience of university studies, while study track 2 is for students in between. All three study tracks are represented in this study, and the sample of the study is taken from two SFI schools in two different municipalities.

The study design is inspired by an ethnographic approach, in the sense that we have collected different types of qualitative data (cf. Hammersley & Atkinson, 2007): from observations of teachers' work (particularly their teaching), semi-structured interviews with teachers. Some data were collected in October 2018 and the majority during the autumn of 2019.

In total, the work of seven teachers was observed. Field notes were taken during the observations, they contained 57 pages and were based on 39 hours of classroom activities and a smaller amount of time observing the teachers' work outside the classroom before and after class. During the observations, we had the opportunity to ask informal questions about the teaching. The observations helped us to gain familiarity with how the teachers enacted the teaching in practice.

Moreover, we interviewed eight teachers, the ones whose teaching was observed, plus one additional teacher. The interviews focused on how they taught second language education, the conditions of the teaching, and the potential they saw that their teaching had for students' social inclusion. The teachers, all women, were formally qualified. Most had worked with the education of children or youth before they had supplemented their teacher education with a qualification for second language teaching. The interview questions focused on the teaching, how the teachers interpreted their teaching mission, the students' potential, and the aims and conditions of SFI education. The study is part of a larger research programme on migration, language learning and social inclusion, in which also municipal leaders, principals, and students have been interviewed, too. These interviews are not included in the analysis of this article but have served, indirectly, to contextualise the teachers' answers.

The larger research program has been ethically approved by the Swedish Ethical Review Authority, and the study follows the ethical recommendations stated by the Swedish Research Council. The participants were informed about the purpose of the study, how the data were to be treated, and that they could withdraw their participation at any time. Both teachers and students were granted confidentiality and gave written and oral consent to participate.

We analysed field notes from observations of the teaching and the interviews. By analysing these materials together, we could capture how the teachers talked about their teaching and some examples of how the teaching was done. The data were analysed

thematically (cf. Braun & Clarke, 2006). First, we familiarised ourselves with the material. The codes we identified in the data were sorted into tentative themes, which were reviewed repeatedly in relation to the notions of social inclusion. In the first stage, we elaborated themes that lay close to the empirical material, of 'perceived learning needs for inclusion' and 'teaching activities/actions for inclusion' to capture different aspects of teaching such as content and activities, the needs of the students and learning goals. Later in the process, the concepts of qualification, socialisation, and subjectification were used to further analyse how the teachers conceptualised different aspects of teaching for social inclusion through second language education. From this analysis, the themes of 'teaching language for qualification and participation', 'teaching civics and norms for participation' and 'conceptualising students as emerging participants' emerged. Moreover, we use Fraser's concepts of needs interpretation, redistribution, representation, and recognition to discuss the potentiality of teaching second language education for social inclusion.

To illustrate the findings, we selected quotations from the interviews and excerpts from the field notes and translated them from Swedish to English. We selected the quotations and field notes representing recurrent themes and the different teachers participating in the study.

Findings

In this section, we show how the teachers conceptualise adult second language education and SFI students and how they enact teaching in relation to these conceptualisations. To illustrate this, we present themes of teaching language, teaching civics and norms and conceptualising students as emerging participants.

Teaching language for qualification and participation

From the observed teaching and the teacher interviews, it appeared that a central part of the SFI teaching was to provide the students with formal language qualifications. This is seen in how the teachers, in line with the Curriculum of SFI (cf. the Swedish National Agency of Education, 2018), in their teaching focused on developing students' abilities to understand and use the Swedish language. In the observations, the teaching focused on grammar, the meaning of words, listening comprehension, speaking activities, and reading and writing. An example is seen in the following fieldnotes in which the students work with an old national exam:

> When the students had listened to the audio recording twice, they were to discuss their different answers, including "Why are your answers the right ones and the others wrong"? . . . Two groups start to talk with each other. They have different views on if the first or the sending statement is the right one . . . When the teacher, Eva, notices that the answers differ, she explains that they try to be tricky in the exams of the D course by including information about everything. "One must look at the question itself! She shows a written version of the audio-recorded text on the smart board and reads it and underscores the right alternatives or the information that gives clues to the right answers
>
> (Fieldnotes, 30th of October 2019)

The lesson activity above shows that the students were to practise listening and talking as well as reading some pre-given questions. At the same time, however, the teacher, Eva, also strived to prepare the students for the formal exams by aligning the teaching content to the knowledge and skills, e.g., understanding the logic of tests, which she knew were

typically exams. She was not the only teacher who was teaching for the test. Essential time was assigned in observed lessons time to pre-testing students and/or going through test results as preparation for the formal examination. In the interview, Eva talked about the importance of this, by giving an example of two students who had lived in Sweden for a long time without entering SFI studies and who, repeatedly, had failed national examinations in the Swedish language. It was not until they became enrolled in SFI, they learned the logic behind the examinations and, consequently, how to pass them. This example, as well as the teaching for test activities, highlight the importance teachers assigned to teaching for students' formal qualifications governed by predefined goals (cf. Biesta, 2010).

However, in addition to the focus on formal qualifications, the teachers also highlighted the need for the students to develop the students' functional language knowledge and skills for participating in everyday life.

> You're to be able to speak when you go to the employment agency, to speak with the doctor, you need to go shopping. You must go to the housing office or wherever you turn to talk about your accommodation. These things are what you need to learn first. And to even get there (to these places), you need to read the signposts. (Klara)

The quotation reflects the view of the Swedish language as a condition for participating in everyday life and various societal institutions outside school. A similar idea was reflected in the teachers' choices of teaching material during the observations, and how they said that they chose teaching examples resembling real-life situations and objected to the fact that some parts of the examinations tested language skills they did not see as relevant to students' lives.

More abstract parts of the teaching, such as grammar instructions, were also regarded as functional by the teachers. Eva said that she wanted to provide the students with tools to use independently when using Swedish after completing their SFI education. That was the given reason why she integrated grammar instruction with reading and speaking exercises and strived to explain the principles behind the Swedish language. Another teacher, Ella, who was seen to teach grammar as a separate part of the lesson, had a similar view of the results of grammar teaching. She said about the use of the grammatical scheme she used in instruction 'One is not constantly thinking about the grammatical scheme. But when one knows, and something feels strange . . . then one can make use of the scheme.'.

The strivings for supporting students' functional language knowledge and skills and independence are also reflected in the method of genre pedagogy, which Klara said that she applied. This approach aims to give students examples of a certain type of text, and then let them write such a text together with the teachers and peers before reaching the goal of doing it by themselves.

From the findings described above, SFI teaching is conceptualised as something which should prepare the language students for passing exams, and by doing so qualify students for further studies and/or employment. Moreover, the findings illustrate how the teachers expressed the importance of teaching to develop a language useful for everyday life. To achieve this the teachers strived to socialise the students into different learning and language practices by using genre pedagogy and certain grammar instructions. A potential for subjectification (cf. Biesta, 2018) can be seen in the ambitions to support students in becoming more independent as language users. However, this potential depends on how predefined the teachers' conceptualisations of the students' needs to become independent language users are, and if the teaching enables a learning process where the students discover and impact which knowledge and skills they want to develop

(cf. Säfström & Biesta, 2011). Moreover, the teaching does also hold the potential to achieve social justice (cf. Fraser, 2005), since it provides the students with formal qualifications and language skills, which we choose to see as linguistic resources, crucial for participation, and consequently also representation e.g. in working life. The formal qualification does also appear as a way to be recognised as a language learner.

Teaching civics and norms for participation

During the interviews, the teachers talked about SFI teaching not solely as teaching for language development but also as teaching civics and norms for participation in Swedish society. The teaching, too, held content and activities specifically chosen to prepare the students for participation in various contexts. The lessons observed included e.g. a study visit at a leisure time activity centre, information about famous Swedish people, talk about what Swedish people often do on Friday nights and how to make small talk. One central aspect of how the teachers talked about participation was the importance of getting a job:

> What tools can we give them, so that they can get a job? What do you need to know? . . . What types of professions are there here in Sweden? How do you apply for a job? How do we write a CV? These are relevant things . . . how a job interview is carried out. We practise job interviews because many of the students have never been in an interview since it doesn't work like that in their homelands. (Erika)

This quotation shows a will to teach the students about the Swedish labour market and the job application process. Such a strive was moreover seen in one of Erika's lessons where her students were asked to speak in pairs about which personality traits and characteristics, they would use to present themselves and how to express this in Swedish during a job interview. The different qualities were later listed on the blackboard, followed by a discussion in class on how words might be interpreted as either positive or negative depending on the situation and what characteristics and words would be most appropriate to use when applying for a job. Such an exercise illustrates how the teaching of vocabulary was linked to work life, but also how teaching language use also implies teaching norms of Swedish working life.

In the interviews, the teachers also talked explicitly about the need for teaching norms crucial for students to learn in order to get a job in Sweden, for example, not letting job seeking be limited by gender patterns since both men and women were supposed to work, the importance of being on time for work, and to take part in informal small talk and coffee breaks. In that sense, teaching could comprise both instructive and fostering elements, which both served to inform about Swedish work life and to socialise the students by fostering specific values, attitudes and behaviours (cf. e.g. Carlson, 2002; Zachrison, 2014). Teaching in ways that offer a possibility for the students to reflect on the information and contribute to how it should be understood in relation to their future decisions could be seen as subjectification (Biesta, 2010), to break into the world as subjects using the knowledge and being able to orient oneself in relation to society. However, if teaching doesn't allow the students to make sense of the information in relation to their previous experiences, the teaching tends to foster the students in specific predefined directions to adjust to Swedish society.

Another example of how teaching comprised both a civic content and a strive to foster certain ways of living is seen in the following transcript where two teachers were interviewed together:

> We have talked about the money issue . . . How does it work with money? . . . Because one must understand. How do I get funding? "I work here and get my salary. You get your financial support from the health insurance office or the social welfare office or whatever." What type of money is that? One tries to make them understand that "you are welcome here because we want you to be here. But it is a lot of money". (Linda)

> One tries to encourage them. It is important for you and your family that you develop your Swedish . . . that you can live here, and that you can start to pay back and take part in society . . . get a job . . . buy your children's food and feels that "I have paid for this myself". (Hilda)

In this example, the teachers say that they wish to teach the students about the welfare system in Sweden, but at the same time also convey norms of how citizens in return are expected to work, provide for themselves, and pay taxes. In this sense, the redistribution of resources through the welfare system is conditioned by certain ways of being members of society, such as speaking the majority language, working, and paying taxes. Following the line of reasoning about teaching civic content and norms, inclusion appears as something possible only in the future and if students learn and adjust to society.

Conceptualising the students as emerging participants

In the interviews, the teachers conceptualise the students based on their knowledge of the students' educational background and approaches to studies. Students with little education, health issues, or of an older age, were depicted as less likely to complete their studies. Well-educated students were described as motivated and fast learners, who completed their courses and aimed at skilled work or higher education. Eva, for example, meant that SFI could 'be a quick way if one is motivated to study and can learn quickly'. Thus, students were conceptualised as closer to or further away from being socially included.

The students were also conceptualised through the choices of how to teach. The teaching activities observed implied that the students were to mainly listen, do fill-in exercises, or use ready-made phrases. Thus, the teaching offered few opportunities for students to use the language authentically and connected to their own experiences. During the interviews, only one teacher explicitly talked about bringing in students' experiences:

> You must talk about their experiences and what they have done before they came here and then associate it with the teaching and do things with it. And to write, if you write together or if you talk about pictures, you must talk about them [the students] to bring their experiences into school for them to understand. (Klara)

The teacher in this quotation highlights the importance of the students' previous experiences to facilitate their learning. Still, experiences, however, are presented as a source for the teacher to relate the teaching content to the students, not as a way for students to participate fully, by expressing themselves and making sense of the content.

The teachers also conceptualised the students in relation to the world outside the classroom when describing teaching activities such as reading/watching the news and making study visits in the local society:

> Many [students'] knowledge of the surrounding world in Sweden is very limited. One notices that when doing things outside the school. "What! Is it a park here? And it's not far from where I live. I'll bring my children here." Thus, I think SFI plays an important role in helping them discover the local area. Many just go home directly from school to wherever they live and then they come to school. So, I believe that we have an important part to play,

> to show them. We usually go to the concert hall (. . .) or visit museums to show alternatives of what they can do. (Stina)

The quotation reflects the idea of using study visits as a teaching activity to offer knowledge about society and encourage students to take part in leisure time activities. The latter was linked to a conceptualisation, reflected in the interviews, of the students as lacking knowledge about public spaces, activities, and the importance of leisure time activities for well-being. This type of teaching activity reflects a conceptualisation of students as in need of information and guidance for actively taking part in society in predefined ways (cf. Säfström & Biesta, 2011). Another teacher, Mirja, talked about encouraging students to become democratic citizens. She strived to be a role model herself, in terms of talking to the students about how to 'think, reflect and reason' as an experienced citizen in 'a democratic country'. She wanted to show the students that she was familiar with traditions from other countries and to use that knowledge as a starting point in her teaching:

> It can help them to be more motivated in understanding the Swedish mindset and tradition when they see that there is an exchange [of ideas] (. …) You must be prepared so that you may live here. And then, we don't want you to only sit at home, but to be active and participate, to be a democratic citizen.

The quotation reflects a conceptualisation of students as not knowing what it is to be a democratic citizen. In her teaching, therefore, she wants to urge students to take part in contexts outside of home and school. Her statements illustrate how teaching towards these predefined goals, comprises an approach to students and social inclusion which does not recognize students' knowledge and experiences of democracy (cf. Fraser, 2005). A similar approach to socialise students towards taking responsibility, being active, and participating in social contexts was articulated by Hilda, who talked about teaching a group of female participants:

> It has to do with gender equality and to dare speak up in public. That you, as a woman also can and should make yourself heard. And that in a society where both men and women are working, we are better off. Women are important in politics (. …) We talk a lot about the importance of women taking part in decisions in the parliament, if we want to have a society, live in peace, and invest in hospitals, schools, and preschools instead of spending money on wars.

When urging the students to participate, Hilda uses the word 'we' in a way that includes both her and the students as responsible for society. Another teacher, Erika, who also used the words 'we' did differently, however. She talked about how 'we' may feel insecure and awkward when speaking another language, which conceptualises the students as equal to her and others in second language learning.

Overall, there is an emphasis in the teachers' conceptualisations of the students as a 'they' in need of both increased knowledge and socialisation to actively take part in various social contexts such as working life and politics to become included. Given that migrant social inclusion is dependent on representation and recognition of their experiences, the potentiality of SFI teaching depends on how the experiences are used and by whom (cf. Fraser, 2005).

Concluding remarks

The results illustrate that teachers conceptualise and enact teaching for social inclusion in second language education for adults in relation to their interpretations of the students and their needs to be included. SFI teaching is enacted by focusing on language skills for formal qualification and everyday life as well as civics and norms for adjusting to Swedish society. Furthermore, even if the students are conceptualised differently depending on how far they are from the predefined goals of further studies and work, there is an overall tendency to regard them as emerging not only as language learners, but also as citizens lacking the skills, knowledge, norms, and behaviour needed to be included (cf. Kloubert & Dickerhoff, 2020).

The teaching investigated in this study can be understood as attempts to socialising students towards a specific type of adult citizen in line with societal aims, e.g. by being employable and adjusting to a certain type of life as an active citizen taking responsibility (Fejes, 2010; Säfström & Biesta, 2011). Language learning in this sense is regarded as a means, an investment to fulfil these obligations (cf. Flubacher et al., 2018). Moreover, our results show that there are few examples of teaching based on students' explicit experiences (cf. e.g. Lundgren, 2005) and that students are not given much space for agency in their learning (cf. Pötzsch, 2020; Zachrison, 2014). Thus, in Biesta's wording, the students are not allowed to 'break in' into society through subjectification processes in the classroom. Qualification and socialisation become superior to the aims of subjectification in teaching and social inclusion is conceptualised as something taking place in the future given that the students adjust to certain moral regulations of migrants (cf. Spandler, 2007). Social inclusion in this sense, emphasises the individual's responsibility to change. However, as previously discussed, teaching for enabling social inclusion could be conceptualised in other ways. From a social justice perspective (cf. Fraser, 2010), the emphasis of the teaching would rather e.g. be on recognising migrants as already capable, and enabling their active participation both within and outside education. Likewise, if the teaching was enacted in ways that consider all three aims of subjectification qualification and socialisation, it would offer greater opportunities for students to, autonomously, apply the knowledge and skills. Such an approach would recognise the students as already included and open the space between the already existing and the undefined possibilities for the future (cf. Säfström & Biesta, 2011).

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‘Special offers for target groups that otherwise would not have been reached’: Social participation through regional networks in adult literacy and basic education – A multiple-case study

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Abstract

Using the perspective of neo-institutionalism and institutional logics, this article examines regional networks in the field of literacy and basic education. The goal of the analysis is to identify different forms of community-logics within two actor constellations. For this purpose, two regions are focused within a multiple-case study design. The empirical approach is based on interviews with experts from the field of literacy and basic education. The Interviews are evaluated qualitatively. The interview material will be used to identify different logics of communities in the regions and to examine the contexts in which actors orient themselves to the different logics. It becomes clear that communities in adult basic education are constituted on the basis of both geographical and content related aspects. By becoming a member of the communities, the actors benefit from various advantages. This collaboration ultimately enables the social participation and inclusion of the low-literate in the regions.

Keywords: institutional logics, communities, adult basic education, social participation

Introduction: Regional literacy networks as a central factor for social participation

Adult literacy and basic education have increasingly entered the focus of public interest as policy programmes that promote social justice and inclusion have been implemented at the national and international levels. For example, in 2000 at the World Education Forum in Dakar, Senegal, adult basic education was declared a right for all (UNESCO,

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2000). In 2003, the proclamation of the United Nations Literacy Decade highlighted the significance and political interest in the topic. Adult basic education is associated with an 'improved quality of life' (UNESCO, 2002, p. 5), which is to be achieved through agenda setting and 'partnerships at all levels' (p. 5) – namely international, national, subregional, and regional. The policy paper for the National Literacy Decade (2016–2026) in Germany also defined literacy and adult basic education as 'prerequisites for a self-determined life' (Bundesministerium für Bildung und Forschung, 2016, p. 3). The paper called on society as a whole to meet this challenge with a 'broad alliance' (Bundesministerium für Bildung und Forschung, 2016, p. 4). The policy programmes emphasise the importance of adult basic education in the context of promoting the *social participation* and *inclusion of low-literate people*. This aspect was supported by Irving (2020), who related literacy to the democratic right to access information. Effects at the level of adult education practice were achieved in the course of the Alpha Decade through the promotion of numerous projects in the field of adult basic education. An exemplary compilation of the projects can be found in the work of Koller et al. (2020).

Furthermore, interest at the level of educational policy and practice is reflected in the attention paid by adult education research to adult basic education. For example, the 2019 International Yearbook of Adult Education was devoted to 'Adult Basic Education Research' (Schemmann, 2019). Another recent study critically examined the potential of large-scale surveys in literacy (Buddeberg et al., 2020). Other works have investigated the educational policy structures of adult basic education from international and national perspectives. Knauber (2017) examined adult basic education policies and the governance of adult basic education in various European countries. From an *international-comparative* perspective, the author's focus was on 'which actors with which resources have an impact on the content-related, process-related dimension of adult basic education policy' (p. 86). In addition, Knauber and Ioannidou (2016) reconstructed various governance structures in adult basic education and examined their effectiveness at the *international level*. For an analysis of politically motivated interventions in adult basic education at the *national level* in Austria, see Cennamo et al. (2020). Research at the *national level* in Germany focused on the educational policy interests of actors in adult basic education (Euringer, 2016).

Moreover, recent research has also focused on the coordination of action at the *regional level* of adult basic education (Bickeböller, 2022; Koller et al., 2021). Such studies have demonstrated that a variety of actors from all levels of the adult education system are involved in the development of adult basic education programmes. The skills of the actors and the projects with which they attempt to institutionalise adult basic education at the regional level were the focus of a paper by Bickeböller et al. (2022).

A further examination of processes at the *regional level* seems indispensable, as it 'holds a high potential for self-organisation, which in part only needs to be initiated and channelled' (Möltgen-Sicking, 2019, p. 42). Due to its 'proximity to the citizens' (Möltgen-Sicking, 2019, p. 24), the fruitfulness of such an examination due to the inclusion of these very citizens becomes apparent. The prominence of the *regional level* is also evident against the background of new funding instruments in North Rhine-Westphalia, which explicitly support literacy and adult basic education programmes in the context of 'measures for regional educational development' (WbG NRW, 2021, §13a). The goal of the funding instrument is to strengthen networking within 'regional educational landscapes' (WbG NRW, 2021, §13a).

Despite its popularity, the term 'region' is often unspecific in terms of the areas it denotes and the scope that it outlines (cf. Bernhard, 2014). In this regard, Fürst (2002) described a 'tension between a functional and a territorial view of region' (p. 23). While

territorial regions are characterised by geographical boundaries, functional regions are constituted by cooperation structures with regard to a common topic. Against this background, questions arise as to how actors in the field of adult education act regionally and how regions can be opened up for action. This article aims to generate insights with regard to the *regional level* of literacy and adult basic education. The focus is on the various frameworks that actors base their actions on. The guiding research questions are as follows:

1. What aspects of territorial or functional regions can be identified in the field of literacy and adult basic education?
2. In which contexts are actors at the regional level oriented towards territorial or functional aspects?

This article employs neo-institutionalism and the concept of institutional logics. Here, particular reference is made to a concept by Almandoz et al. (2017) that encompasses functional and territorial logics of action (see section *Neo-institutionalism and institutional logics*). Methodologically, the article is based on a guided-interview multiple-case study with stakeholders in regional contexts (see section *Methodical approach*). The results point to various frameworks of action by which communities are constituted at the regional level (see section *Geographical and affiliation-based communities in adult basic education*). The findings are also discussed against the background of the theoretical framing (see section *Discussion*). Finally, conclusions are drawn (see section *Conclusion*).

Neo-institutionalism and institutional logics

The following section outlines the perspective of neo-institutionalism and the concept of institutional logics. According to Alvesson and Spicer (2019), neo-institutionalism is 'one of the most prominent schools of thought within organization studies at present' (p. 199). The perspective has already proven fruitful for analyses of processes in the field of adult education and adult basic education in several studies (Bickeböller et al., 2022; Koller et al., 2021; Schemmann, 2020; Schreiber-Barsch, 2009).

The starting point of neo-institutionalist organisational studies is provided by the contributions of Meyer and Rowan (1977), Zucker (1977), and DiMaggio and Powell (1983). Central to the organisational sociology perspective is the assumption that 'institutional rules function as myths which organizations incorporate' (Meyer & Rowan, 1977, p. 340). Furthermore, organisations more commonly orient themselves to institutionalised expectations because of the legitimacy they receive from them than because of their actual effectiveness (cf. Meyer & Rowan, 1977).

Through a high density of interaction, organisations develop a common awareness and orient themselves to each other – causing so-called organisational fields to emerge. This term describes 'a recognized area of institutional life: key suppliers, resource and product consumers, regulatory agencies, and other organizations that produce similar products' (DiMaggio & Powell, 1983, p. 148).

Another central aspect of the neo-institutional perspective is the assumption that institutions determine the actions of actors. Scott (2001) described them as 'shared assumptions that constitute the nature of social reality' (p. 57). They 'are followed because they are taken for granted as "the way we do these things"' (Scott, 2001). While earlier studies mainly focused on the stabilising effect of institutions and processes of isomorphism, new research also examines change and the influence of actors on

institutions. One concept used to deal with different environmental specifications and institutional expectations is that of *institutional logics*.

The concept of *institutional logics* dates back to Friedland and Alford (1991), who viewed in them a 'set of material practices and symbolic constructions – which constitutes its organizing principles and which is available to organizations and individuals to elaborate' (Friedland & Alford, 1991, p. 248). The concept has since been developed further, particularly by Thornton et al. (2012; see also Thornton & Ocasio, 2008). The authors created a coordinate system for an ideal type of inter-institutional system in which institutional logics exist and operate in parallel: 'Each institutional order represents a governance system that provides a frame of reference that preconditions actors' sensemaking choices' (Thornton et al., 2012, p. 54). Thornton and Ocasio (2008) considered ideal types to provide an analytical lens in terms of 'how individual and organizational behavior is located in a social context and the social mechanisms that influence that behavior' (p. 122). For example, the institutional order of the community legitimises itself through a common will, trust, and reciprocity, drawing its identity from a shared emotional connection. For a more detailed listing of the institutional orders of family, community, religion, state, market, profession, and corporation, see Thornton et al. (2012, p. 107).

A differentiation of the ideal type of community logic was presented by Almandoz et al. (2017), who distinguished between *geographical and affiliation-based communities.* They drew distinctions between the two forms of communities based on five categories (see Table 1). The first category is the root metaphor, which is the centre of an institutional logic to which the other elements align. While *geographical communities* are based on a common boundary that delimits their members from the outside, *affiliation-based communities* are based on a shared belief in a value, goal, or product (Almandoz et al., 2017, p. 6). The second category distinguishes between the sources communities use to legitimise their actions. Due to local proximity, the actors in *geographical communities* have many points of overlap. Accordingly, a critical aspect with regard to legitimacy is the trust and reciprocity between actors (Almandoz et al., 2017, p. 6). Because members of *affiliation-based communities* have fewer points of overlap, they legitimise themselves through their unity of will. The third category describes sources of authority and norms. In both communities, these lie in the members' commitment to the community. The fourth category identifies the source from which community members draw a shared identity. In *geographical communities,* said source is the emotional connections between members. If this identity is particularly strong, it can result in 'us-vs-them behaviors' (Almandoz et al., 2017, p. 7). The 'identification in *affiliation-based communities* is generally narrower in scope' (Almandoz et al., 2017, p. 7). It depends on the intrinsic value of the community to the actors, and a consensus is quickly reached. The fifth category describes the strategies used by the actors to gain attention within the community. In both communities, actors invest in their recognition and status. An overview of the categories can be found in Table 1.

Table 1. Constitutive elements of geographical and affiliation-based communities (based on Almandoz et al., 2017, p. 8)

Categories	Logics	Geographical community	Affiliation-based community
Root metaphor		A common geographical boundary	Conscious affiliation and belief in a particular cause
Sources of legitimacy		Belief in trust and reciprocity	Unity of will in community goals
Sources of authority and norms		Commitment to membership in a valued community	Commitment to community values and identities
Sources of identity		Community reputation; emotional connection	Intrinsic value of the community's goals
Basis of attention and strategy		Investment in honour and status – relevant in multiple contexts	Investment in honour and status – relevant in limited contexts

Notably, an empirical comparison of empirical material with the ideal types is still pending. Almandoz (2012) analysed the influence of community logic on the establishment of new banks. The extent to which aspects of geographical and affiliation-based communities play a role was not part of the analysis. This serves as the point of departure for the present article. The analysis provides insights into the question of which aspects of the two ideal types of communities can be reconstructed within two actor constellations from the field of adult basic education at the regional level. Based on this, results are generated with regard to the question in which contexts the actors orient themselves towards a geographical or affiliation-based community logic. By addressing these questions, this article aims to contribute to steering and coordination processes at the regional level of adult education. Furthermore, it provides new insights regarding the design of regional educational networks for the inclusion and social participation of low-literate adults. In the following section, the two-step methodological approach is described.

Methodical approach

This paper is based on a *secondary analysis* (Heaton, 2004) of data collected in the context of a *multiple-case study* (Yin, 2018) on action coordination in adult basic education. In this section, before the approach of the secondary analysis is discussed, the design of the main study conducted by Bickeböller is outlined.

In the course of the *multiple-case study*, *guided expert interviews* (Meuser & Nagel, 1991) were conducted with actors from the field of literacy and adult basic education from two regions. A compilation of four different types of case studies was provided by Yin (2018, p. 48). A case is considered integrated if it comprises several objects of analysis (here: adult education centres, nonprofit associations, social work associations, and political actors). In an *integrated multiple-case study design*, conclusions can be drawn about the individual case as well as across multiple cases. In the course of the investigation, six interviews were conducted in region one and five in region two (see Table 2).

The selection of regions was based on statistics from the leo. - Level-One study, which found different aggregations of functional illiteracy and faulty writing depending

on the size of a municipality (Grotlüschen et al., 2012, p. 36). Municipalities with 500,000 or more inhabitants had the highest percentage (18.0%) of functional illiterates, while those with 100,000–499,000 inhabitants had the lowest percentage (11.5%). One region was selected from each of the two categories.

The basic condition for the selection of experts within the regions was their activity in the researched field of action (i.e., literacy and adult basic education). The interviewees are considered functionaries within their field of activity since they have a special responsibility within it as well as 'privileged access to information about groups of people or decision-making processes' (Meuser & Nagel, 1991, p. 443). Thus, programme and project managers, the management of two associations, an independent actor, and a political actor were interviewed. They were asked about their networking activities within and outside of their administrative region. An overview of the case composition can be found in Table 2.

Table 2. Multiple-case study design

Case 1 **500,000 or more inhabitants**	**Case 2** **100,000–499,000 inhabitants**
• Manager of an association • Project manager (association) • Project manager (association) • Project manager (social work) • Programme manager • Political actor	• Manager of an association • Project manager (association) • Project manager (association) • Independent actor • Programme manager

The material was analysed by means of a *content-structuring qualitative content analysis* (Kuckartz, 2018). The focus of the main analysis was on the actor constellations, forms of action coordination, and performance level. The category system was created using a multi-step procedure that combined deductive and inductive category formation (Kuckartz, 2018, p. 100). Based on a mean intercoder reliability of 0.65, the intersubjective comprehensibility of the coding framework was regarded as satisfactory (Krippendorff, 2004).

Based on the main study, a secondary analysis of the material was performed. Heaton (2004) differentiated five types of *qualitative secondary analysis*. The present study was a *supra analysis*, which involved 'the investigation of new theoretical, empirical […] questions' (Heaton, 2004, p. 39) that arose from the primary study. The coded interview passages from the categories *'K01.2 Organisational structure and organisational self-image'*, *'K01.3 Understanding of adult basic education'*, *'K03 Actors'*, and *'K04 Coordination of action'* of the primary study were subjected to further coding with a new category system. Reay and Jones (2016) proposed various procedures for conducting a qualitative analysis of institutional logics. Oriented to the *pattern matching* method, the new categories were deductively developed from the concept of Almandoz et al. (2017) and applied to the material. In the following section, the material is interpreted against the background of the two research questions. As all of the interviews and the coding were conducted in German, the quotations provided in the presentation of the findings were translated into English by the author.

Geographical and affiliation-based communities in adult basic education

In this section, the focus lies on the evaluation and interpretation of the interview material. Before a qualitative analysis of the interview passages is presented, a quantitative analysis based on the code frequencies is provided. A total of 290 interview passages were assigned codes. In both regions, indications of an *affiliation-based* as well as a *geographical community logic* could be found. The distribution of codes indicating an *affiliation-based community logic* was relatively balanced (case 1: 60 codes, case 2: 52 codes). With regard to the codes indicating a *geographical community logic*, however, clear differences between the cases were observed (case 1: 103 codes, case 2: 67 codes). These differences were particularly pronounced for the categories of *'Trust & Reciprocity'* (case 1: 25 codes, case 2: 10 codes); *'Emotional Connection & Reputation'* (case 1: 23 codes, case 2: 8 codes); and *'Recognition & Status'* (case 1: 11 codes, case 2: 4 codes). Therefore, the qualitative analysis of the interview passages on *geographical community logic* focuses on these categories in particular. In the following subsections, the qualitative interpretation of the data is discussed in more detail. First, an interpretation of the data in terms of the two different forms of community logic (*Affiliation-based community logic; Geographical communit logic*) is given. The subsequent section (*Actors between geographical and affiliation-based community logic*) focuses explicitly on the contexts in which actors are more strongly oriented toward one logic or another.

Affiliation-based community logic

The aspects of *affiliation-based community logic* can be described using the example of a cooperative association, which 'has set itself the goal to bundle and further coordinate the active ones in the field of literacy and adult basic education' (I02_Pos. 40). Except for one association from case 2, all interviewees were part of the network. For I06, for example, it was of particular importance that geographical aspects are not decisive here for coming into contact at all with providers outside of their municipality (Pos. 31). Since many network meetings have occurred online due to the COVID-19 pandemic, the circle of participants has expanded again because 'the dependence on location is no longer so high' (I07_Pos. 24). The cooperative alliance is ostensibly constituted by a content-related focus on literacy and adult basic education and not by the geographical proximity of members. Thus, the added value is that there is 'simply networking across the board [...] and also fixed exchange formats [and] conferences' (I07_Pos. 16).

Furthermore, the regularly organised meetings are characterised by mutual support. Actors who are in the 'same funding phases' (I04_Pos. 14) exchange experiences or create 'synergies' (I04_Pos. 14). By comparing their experiences, the actors learn from each other and can 'also copy something a bit' in the future (I11_ pos. 24). Since the members feel committed to a common cause, a 'constructive togetherness' exists at professional meetings and events (I07_Pos. 18). This sense of community is to be maintained. The network relationships are maintained by, among other things, the actors exchanging information among themselves about their future offers, so as 'not to compete with each other' (I07_Pos. 24). They attempt to set a different focus and keep the spectrum as broad as possible. For the same reason, the association of I01, for example, also avoids regular funding. Participation in these financing structures could jeopardise relationships with his network partners, which is why he prefers to remain in the area of project financing. He stated the following: 'So these pots aren't very big anyway, and the

more people there are fighting over it, so to speak, the less is left for the individual. So, not our battlefield as an *organisation*' (I01_Pos. 18).

In addition to the identification with network contacts, the *affiliation-based community* is characterised by a strong intrinsic interest and identification with the topic of literacy and adult basic education. I06, for example, already dealt intensively with the topic during her studies, wrote her diploma thesis in this area, and worked as a course instructor. Through her professional career, she developed a strong 'interest in the field of literacy' (I06_Pos. 2), which is why she now workes as a department head at an adult education centre. The same is true for I07, who had also worked as a course instructor and conducted research in the field. Some of the founders of their association 'are still really active and well-known personalities' (I07_Pos. 20). This commitment beyond the professional career speaks of a strong identification with the field: 'They really burned for it' (I07_Pos. 30).

The actors also use this commitment and know-how to advocate for the values and interests of the community. On the one hand, this includes keeping the existing network alive and maintaining it. Thus, I07 attempts to 'get to know different actors, to get to know different projects' (Pos. 24) to have a close connection to all members. On the other hand, the commitment consists of winning new actors for the interests of the field. A crucial aspect here is the acquisition of new cooperation partners for the joint development of services. Through sensitisation and public relations, the actors attempt to convince companies to, for example, 'include the topic of work-oriented adult basic education more strongly in their own thinking' (I02_Pos. 24). Companies are presented with potential benefits of funding measures for their own workforce: 'Here you have another opportunity to promote your employees and, at the end of the day, to position yourself better in the market' (I10_Pos. 27).

Moreover, advocacy for the values and interests of the community consists of raising awareness and advising political actors and funding agencies. I01 stated that he attempts to bring the topic of literacy and adult basic education onto the agenda in relevant committee meetings. Here, he often first answers 'the questions as to why there should be such a thing in Germany at all' (I01_Pos. 40). However, if he can 'prove that I'm not just blathering, but that the offerings actually work' (I01_item 53), political actors are receptive. In this case, opportunities arise for I01 to positively change the framework conditions for the field through consultation. For example, one funding agency has expanded the catalogue of topics for lifeworld-oriented adult basic education as a result of the advice provided by I01's organisation. This makes the association and other active actors from the field 'much more connectable [...] to certain structures' (I01_Pos. 53). In the following subsection, interview passages that are connected to a *geographical community logic* are discussed in more detail.

Geographical community logic

This subsection explains the extent to which aspects of a *geographical community logic* guide the actions of the actors. These aspects were particularly relevant in case 1. This region is highly heterogeneous due to its size (>500,000 inhabitants). To establish adult basic educational offerings in the metropolis, the actors are oriented toward very small-scale geographical boundaries below the city level. To gain access to participants, even the orientation to city districts is too coarse, which is why the actors 'really have to go down to the neighbourhoods or quarters' (I01_Pos. 36). Here, the problem situations or challenges differ depending on the neighbourhood.

Accordingly, the district in which the organisation is anchored is initially significant: 'Yes, we are located in *district* [...], a bustling district, [...] but on the other hand also many of the people there locally with whom we work' (I02_Pos. 8). Because of the proximity to the people, trust can be established and access gained. To establish services in other parts of the city, the association cooperates with other actors who are located there. These are above all 'smaller institutions, in the social areas that meet certain indicators where you can see okay here there is a need for support, here there are a lot of people who are affected by exclusion' (I02_Pos. 10).

Accordingly, the association first obtains an overview of the needs in individual neighbourhoods and then attempts to establish offerings there through cooperation. The presence in the districts is also critical for the adult education centre in the metropolis. I06 considered the ability to provide access in different areas of the metropolis a great advantage: 'And there is also the possibility for interested people to simply come to our house and get in touch' (I06_Pos. 16). In addition, the actors in case 1 are in a 'close exchange' (I05_Pos. 16) with regional education policy. Due to the diverse provider structure and close ties, the actor from education policy spoke of a good 'basic structure' (I05_Pos. 14) within the metropolitan boundaries.

In case 2, a district-specific literacy and adult basic education programme is still being developed. Thanks to the new funding from the amended Continuing Education Act, the Adult Education Centre has been able to establish a continuing education advisory service in the city districts; however, 'this will be seen in perspective, to what extent it bears fruit and perhaps can be expanded' (I11_Pos. 10). In addition, there are referral structures to the adult education centre 'because they also have a large area of reading and writing courses' (I09_Pos. 6). For the joint organisation of public relations activities within the region, the actors appreciate their geographical proximity, because 'you can just meet somewhere for coffee and discuss the whole thing' (I10_Pos. 21).

Trust and reciprocity are crucial components for cooperation in the *geographical community*. This was particularly evident in the joint development of adult basic education programmes in case 1. As described above, the association of I01 depends on cooperation partners in the city districts for the acquisition of participants. I01 described the joint development of offers as barter transactions, in which he offers the educational management as a resource to the cooperation partners in return for learning locations and participants. He described this as follows:

> We sort of go and match that demand, that need at the learning site with our resources and that's usually the opportunities to fund the lecturer honoraria, to do the educational management, to print the flyer, etcetera, to do curricular proposals and preliminary work and we bring that together. (I01_Pos. 28)

By bringing resources together, actors benefit from each other and can initiate district-specific 'special offers for target groups that otherwise would not have been reached' (I03_Pos 18). Each is dependent on the other to make the courses happen. Not having to worry about education management, for example, was a 'great benefit that we have used as a network partner' for an actor from social work (I03_Pos. 16). However, because of this interdependence, these structures of supply development are very fragile. Accordingly, the actors must be able to trust each other. These trust relationships also enable the actors to perpetuate project offerings beyond their duration. For example, courses financed by project funding were transferred to the local adult education centre after the project period. There is now 'a course at the adult education centre that is only running now because it originally came about through the project' (I06_Pos. 25). This would not have been possible without trust within the *geographical community*. In the

meantime, a ‘permanent contact person’ (I06_Pos. 14) has been appointed at the association to maintain the connection between the association and the adult education centre.

In addition to the trust that the actors have in each other, they must also gain the trust of potential participants in the district. To make adult basic education offers and their own association ‘known in the district, we made a health offer, namely a pumpkin competition’ (I02_Pos. 30). At a neighbourhood festival in the spring, seedlings were distributed, which were processed into soup at an event in the fall. Through this offer, the association came into contact with the people in the district and was ultimately able to initiate a literacy course on site. The long-term planning illustrates how much energy the association invests into building trust in the district before the education programmes can finally start.

In case 2, reciprocity was expressed as part of a research and development project between an association and the local university, which involves working on an app for the low-literate. While the association has the pedagogical knowledge about the target group, the university contributes the technical knowledge: ‘So basically, I’ll put it bluntly, that’s someone who comes from the technical side, who does this whole chatbot, the technical implementation of language, of AI, etcetera’ (I09_Pos. 16).

Another key aspect for the success of a *geographical community* is its reputation. The actors establish emotional connections within the community and may set boundaries with the outside world. This was particularly evident in a statement made by I05, who emphasised – with regard to the cooperation in case 1 – being ‘absolutely thrilled by our *location* model, [...] not only from the cooperation, from decades of it, but also in terms of the content of what has been achieved there’ (I05_Pos. 14). In this statement, I05 assigned a label to the cooperation in her region, which not only included all actors involved from her community but also differentiated it from other regions. She was proud of the structures in her local area and was convinced that ‘this is something [that] should be rolled out’ (I05_Pos. 14). This conviction was shared by I01, who emphasised that they were ‘pretty much alone with the approach in their region for quite a while, also took a lot of criticism from the literacy landscape’ (I01_Pos. 65). In I01’s conviction, an us-vs-them mentality is also characterised. The actors from case 1 have broken new ground with their strategy, which was not always evaluated positively in the field. However, this has not deterred them from continuing along this path within the region. Emotional connections in the form of ‘cooperations that have existed for years, i.e. beyond this project’ (I03_Pos. 14), were helpful for this. According to I05, this form of togetherness is ‘also a long tradition here with us’ (I05_Pos. 30).

In addition to the community’s external reputation, the reputation within the community also guides the actions of the players in a *geographical community*. To create relationships of trust, the actors must first make a name for themselves and prove themselves to be trustworthy. Here, the decisive factor is an initial success: ‘Once you have done something [...] then you also find other topics’ (I02_Pos. 20). This acts as a flagship and increases recognition within the community: ‘So word has gotten around in the *location’s* structures’ (I01_Pos. 34). This was confirmed by an actor from case 2, namely I09, who emphasised that ‘once you have done something [...] then you also find other topics’ (pos. 20).

Actors between geographical and affiliation-based community logic

The aforementioned results have described which aspects of an *affiliation-based* and *geographical community logic* could be reconstructed in the two cases. In both cases,

aspects of both forms of community logic could be reconstructed, with aspects of *geographical community logic* prevailing in case 1 and aspects of *affiliation-based community logic* prevailing in region 2. In this subsection, the focus is sharpened on the contexts in which actors orient their actions more strongly to one or the other logic.

Focusing on the components of the *affiliation-based community logic*, it became clear that they often occur in connection with contexts aimed at a general further development of the field. This could be conferences, fairs, or other exchange formats between actors in literacy and adult basic education. Accordingly, by participating in the *affiliation-based community*, stakeholders gain knowledge of 'new developments in the field and studies, research results, publications, then getting to know, maybe new colleagues' (I11_Pos. 24). The individual and – above all – collective added value ultimately lies in the progressive professionalisation of the field as well as in public relations work and a broader social awareness.

In addition to the exchange of experiences, these formats lead to a unification of the field. The players join forces and commit to a common goal. Accordingly, I09 saw great added value from these meetings in terms of the 'preservation of value' (I09_Pos. 22). This value lies in the 'integration of all persons and the enabling of learning for all persons' (I06_Pos. 6). The actors see their work as valuable because it is a 'social mission to catch up on what has been missed' (I07_Pos. 16). Thus, another added value of the *affiliation-based community* lies in the self-assurance of actors.

With regard to the *geographical community logic*, as described above, the components of trust and reciprocity in particular as well as emotional connections and the reputation of the community among actors in the metropolis could be reconstructed. If one examines these components more closely, they can be observed to often be connected with the development and establishment of concrete adult basic education offers in the regions. Geographical boundaries in the sense of districts, neighbourhoods, and quarters in which the target group is located are particularly critical in the development of services in lifeworld-oriented adult basic education.

As a result, geographical aspects are a guiding factor in the acquisition of participants and the development of services. I02 stated the following: 'My colleague regularly walks through the neighbourhood and talks to people' (I02_Pos. 28). He and his colleagues 'don't want to just make blanco offers and hope that someone will come, but we want to go somewhere and say "What do you need?"' (I02_Pos. 24). To be able to realise this, integration into a *geographical community* is indispensable for the association, since through this they gain access to places 'where, so to speak, the potential learners are anyway' (I01_Pos. 30).

The fact that maintaining relationships within the *geographical community* is a high priority was underlined by I02 describing the partners in social spaces as the 'most important actors' (I02_Pos. 22). Furthermore, I01 took a critical position against the networking formats of the *affiliation-based community*:

> We then came to the conclusion that it was very nice networking, because it was always the same eight actors who confirmed among themselves how bad the world is and how important the topic of literacy is. You can do that, sometimes it's good for your soul, but it doesn't really bring you forward. (I01_Pos. 38)

The top priority of the *geographical community* is to change the structure and establish adult basic education offerings within its own borders. Accordingly, the actors are guided in their actions by relationship building, reciprocity-based bartering, and their own reputation within these borders. The next section provides a discussion of the results in the light of the theoretical background.

Discussion

The results of this study provide new insights into institutionalised practices and expectations that guide actors in the field of literacy and adult basic education in Germany. In addition, findings were generated with regard to the importance of geographical aspects in the networking of actors in the field of adult basic education. Thus, this contribution provides new findings regarding the coordination of action at the regional level of adult education.

By orienting the analysis to the concept of *institutional logics*, particularly to the ideal types of *geographical* and *affiliation-based community-logics*, two different forms of networking among the actors were reconstructed. While relationships within the *affiliation-based community* were established because of a common theme (adult basic education), actors within the *geographical community* established contacts because of their local proximity. An interesting finding was that both forms are relevant for the actors in both cases, which indicates that networking at both thee geographical and content levels is essential for the survival of adult education organisations.

Next, the article examined practices and rules that guide action within the two forms of community. The *affiliation-based community* legitimises its existence through a shared belief in a unifying value. The actors affirm each other and create an atmosphere of belonging. The degree of their investment in the community depends on their intrinsic motivation to contribute. By contrast, within the *geographical community*, relationships are based more on the building of trust and reciprocity. In barter transactions, the actors pool their resources and prove themselves mutually trustworthy, which leads to close and emotional ties in the long run. In order not to lose this status, members invest heavily in their reputation within the community.

Finally, the article focused on the added value that membership of the two forms of community means for the actors. By participating in the *affiliation-based community*, actors gain insights into new developments in the field and can learn from others. The belief in the common value strengthens the actors' self-confidence in their own work. By participating in the *geographical community*, the actors gain access to target groups and can establish adult basic education programmes within their region. Here, they have the opportunity to apply the aspects learned from the exchange within the *affiliation-based community*. Thus, both forms of community are, in different ways, a prerequisite for the further development and professionalisation of the field and a central factor for the social participation and inclusion of people with low literacy. The following section frames the findings in terms of their added value for adult education practice, policy, and research.

Conclusion

Overall, it can be stated that the concepts of *geographical* and *affiliation-based community logics* proved fruitful for this study's analysis of the collaboration of literacy and adult basic education stakeholders at a regional level. Within the framework of the *multiple-case study*, it was possible to reconstruct components of the two forms of community within two actor constellations. The reconstruction enabled a focus on the added value that both forms have for the actors as well as for the field.

This was followed by a classification of the findings in terms of their relevance for educational practice, policy, and scholarship, as well as for the inclusion and social participation of low-literate people.

Practical benefits arise with regard to the networking of adult education organisations. The findings indicate which practices are expected from adult education

organisations in different networking contexts. In this regard, the results of research question one are particularly significant. They point to practices of action that are specifically relevant in the two forms of community. In addition, this study provides insights regarding the benefits that adult education organisations can derive from participating in different networking contexts. In this regard, the results of research question two provide insight, pointing to the advantages of membership in the different forms of community. Depending on the interest (e.g., field knowledge or access to the target group), one or the other form of community is more profitable.

These insights will continue to open up connections for educational policy. In addition to the promotion of networking per se, possibilities are opened for the precise promotion of different forms of networking. If, for example, there is an educational policy interest in progressive professionalisation and awareness-raising in society as a whole, the promotion of cooperative alliances in the sense of an *affiliation-based community logic* would be a good idea. If, on the other hand, there is an interest in promoting innovative strategies of supply development, the support of regional barter transactions in the sense of a *geographical community logic* would be recommended.

With regard to research on continuing education, this article opens up a new perspective on the analysis of networking structures at the regional level through its orientation on the concept of Almandoz et al. (2017). On the one hand, it will assist analyses of processes at the regional level, shedding light on this hitherto little researched level. On the other hand, it brings a theoretical perspective to the debate, which will prove fruitful when applied to other levels and actors. Furthermore, research opportunities exist in the empirical analysis of further ideal types of *institutional logics* (e.g., market and state) in the field of literacy and adult basic education.

Finally, this article demonstrates how different forms of networking can contribute to the inclusion and social participation of low-literate people. By promoting *affiliation-based communities* in adult basic education, innovative and successful strategies will receive broad attention in the field. In *geographical communities*, low-literate people are directly involved in the development of services. This involvement of the target group and their lifeworld is not only critical for the design of suitable educational programmes but also for their social participation and the promotion of social justice.

Declaration of conflicting interests

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

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Adult education and belonging: A view from Ecuador

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Abstract

Access to education is a matter of individual and communal justice and development. However, simple access to education, and simple inclusion as often noted in DEI, fail to capture the structures of power and inequality that limit the potential of education. It is not enough to be in education, we must aim for an education adult students can belong to. This requires that we re-conceptualize belonging as complex, non-binary, and multifaceted, acknowledging the struggles of our adult students to participate in education. For this re-conceptualization, we call upon theories of liminal belonging, in particular Anzaldúa's idea of mestiza consciousness. We use adult education students in Ecuador as a case study to reflect on the gender and identity struggles to belong and conclude with some recommendations of how pedagogy and institutions can be adapted to foster belonging for adult learners.

Keywords: adult education, belonging, inclusion, liminality, DEI

> …Not even the best-intentioned leadership can bestow independence as a gift. The liberation of the oppressed is a liberation of women and men, not things. Accordingly, while no one liberates himself by his efforts alone, neither is he liberated by others.
> Paulo Freire

Introduction

Adult education is a matter of social justice. Neoliberal discourses present education as a necessary tool to prepare a state's labor for ever-changing technical and economic needs. This explains the emphasis on adult education in Sustainable Development Goal 4, which

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includes target 4.4 ‘By 2030, substantially increase the number of youth and adults who have relevant skills, including technical and vocational skills, for employment, decent jobs and entrepreneurship’ (UNDP, 2022). Yet, education is not simply an instrumental good. Education is an intrinsic good as it provides tools, strategies, and spaces for individuals to fulfill their human capacity (Sen, 2009; Rajapakse, 2016). Moreover, retaining education’s link to the capitalist labor model reinforces its colonial epistemology: that knowledge is only that which serves the markets. Re-thinking education as a personal tool of empowerment (Rowlands, 1997) requires considering the individuals accessing and using education and what knowledge is for these individuals outside and beyond the structures of coloniality. In other words, it requires rethinking epistemology itself to consider how decolonial epistemologies can be built based on indigenous knowledge and cosmovisions that differ from the Western logos (Mignolo, 2009).

Education is also a tool for social change as students and teachers are empowered to shape society in a manner that allows for the greatest well-being. This is possible, again, only if education is critically assumed and identified as a political fact. This requires an educational policy and practice that seeks to overcome the traditional role of education as a transmitter of hegemonic narratives and, consequently, as an instrument of oppression. Education for social justice requires the involvement of the population in education, so everyone can have the necessary tools to participate in the building of a just society. This includes all adults, supporting the ideal of life-long learning. In particular, this process requires the amplification of voices that have been historically silenced and the acknowledgment of how education has been built *on* those silences (Sriprakash et al., 2020)

Despite its instrumental and intrinsic importance, adult access to education varies around the world. Boyadjieva and Ilieva-Trichkova (2017, p. 97) note that ‘younger adults, those with higher educational attainment, those with jobs, or those employed in high-skilled occupations, participate more frequently [in education] than older, low-educated, and unemployed people or those employed in low-skilled occupations’. The COVID-19 pandemic will have sharpened these inequalities, with adults less likely than youth to make use of technology to advance their education in times of pandemic (Patrinos & Shmis, 2020).

In Ecuador, the focus of this paper, adult education, defined as access to any level of education for those over 18, is limited and of limited quality (OECD, 2018). Lack of access to education particularly impacts indigenous and Afro populations (Oviedo, 2022). For example, a 2008 study by Minority Rights Group International found that in 2001 ‘one-third of the indigenous population was illiterate compared to 4.8% of whites’ (cited in UNESCO 2016, p.1). The 2008 constitution emphasized that primary, secondary, and tertiary education should be secular and free to access. However, entrance exams for tertiary education in practice favor those with the resources to obtain quality primary and secondary education (Rivera, 2019), which can be seen as a regressive tax. More importantly, even when access to education is possible for adults in Ecuador, there is a significant difference between *being in*, and *belonging to*, the educational setting. Belonging, we argue, makes all the difference.

This paper focuses on how we conceptualize belonging and explores adult students' expressions of belonging. It is key to understand that belonging is not unidimensional, unilinear, or binary. One does not simply start and stop belonging. Belonging is a multifaceted, multitemporal process embedded in different fields of power (Bourdieu, 2020). Discussing the inclusion of adult students in education requires us to consider these different fields, the distinct processes of entering each field, and the challenges of

managing their intersectionality. It also requires us to consider that one can partially belong in multiple fields and, therefore, we need to theorize the multiplicity of belonging/non-belonging and existing in these liminal areas of complexity.

This paper will start by presenting our methodology. We will then briefly review how educational inclusion has expanded historically in Ecuador and use this as a background to discuss how belonging to education has been conceptualized. We will then move on to theorize belonging by making use of insights from the literature on mestizaje and liminality. Mestizaje has been a key narrative in the construction of the Ecuadorian state, historically used to limit access to education and operationalize it as a tool of colonialism. We argue that rethinking education from a mestiza perspective can liberate it from colonialism and create spaces where non-hegemonic adult students can belong. This paper explores liminal belongings and looks at some of the ways our students have struggled to belong in relation to their other gender and identity structures.

Methodology

As Noblit and Hare state, understanding people and situations in emic terms promises respect toward people that positivism does not allow (Noblit & Hare, 1988). We try to center our work on the voices of the students who shared with us during our teaching. Our goal is to expand inclusion in education by bringing those voices to the center of our thinking about what education should be, seeking to address Jackson and Piette's criticism that:

> The voices of those who live outside the academic pale and on the margins of the Euro-American world are heard only occasionally, or in snatches, to make a point or confirm a hypothesis. These individuals are seldom described in depth or detail. Their presence is never deeply felt, and their own words are eclipsed by the specialist jargons of the academy (Jackson & Piette, 2015, p. 4).

We use qualitative, reflexive, post-critical ethnographic work to analyze particular forms of everyday politics, morality, and understanding (Noblit & Hare 1988; Anders, 2019), which form the basis of education: axiology, formation, and information. In this paper, we focus our ethnographic perspective on the ‘everyday’ as a concept, which implies, on one hand, a multilocal ethnography, where the ‘world system’ is not predefined, but rather the research explores how it is constructed (Marcus, 2001). On the other hand, this perspective allows a perception of everyday life that assumes a nonorthodox process of collecting information by connecting observation, memories, and specific interactions to organize the aforementioned ‘world’. Thus, we have built an ethnographic body over years of teaching and collecting both our students' reflections and our critical notes on the experience and practice of teaching, on which this paper is developed.

We work with adult Masters students in pedagogy or educational sciences, whose trajectories to education highlight a variety of struggles including gendered divisions of time use and being part of cultural, racial, and ethnic groups who are not part of the elite. Making use of the insights from existential anthropology (Jackson & Piette, 2015), we actively and reflectively (Bourdieu & Wacquant, 1989) consider and analyze the daily experiences of teaching and interacting with these students, to problematize adult belonging and exclusion in higher education. As part of this study, we have reviewed legal and educational texts produced by the Ecuadorian Ministry of Education, interviewed a Director of the Ministry of Education of Ecuador, analyzed interactions and discussions with students, and reviewed relevant literature on belonging and education.

All students and Ministry's employee's quotes are anonymized and non-dated to prioritize their privacy and well-being.

Opening education to 'others'

The educational enterprise cannot be separated from the colonial enterprise. Mass Western education was started as a tool to train workers for the industrial revolution, and to allow workers to labour without care concerns. Education brought by the empires to their colonies was designed to train workers while maintaining and justifying the status quo. Educational access was limited to limit access to cultural, social, and economic capital.

In what is now Ecuador, Spanish rule denied educational rights to indigenous populations, who were only trained in arts and handicrafts while African descendants were enslaved until 1851 (Ayala Mora, 2008). Ecuadorian independence in 1830 was simply an administrative change for these marginalized populations, resulting in no substantial change to social relations or educational access. Independence meant entering a period of coloniality where education was used as an arm of state power, sustaining the hierarchies of power established under Spanish rule (Quijano, 1992; Castro-Gómez & Grosfoguel, 2007). Until the early 20th century, education was led by the Catholic Church, available only to Catholics, following European models and designed by European visitors. The Liberal Revolution of 1895 established secular, universal education. Even after its expansion in 1895, however, education remained a hostage of political forces, with money and favors handed out as payment for political support rather than for the wellbeing of students (Ossenbach, 1999), and with its Euro-centric logic and epistemology unquestioned (Oviedo, 2018).

Thus, the educational institutions set up by the Ecuadorian state limited what knowledge each population could access, and how this education was embodied and assessed (Bourdieu & Passeron, 1990). They supported a particular view of time and aging – with education seen as a linear process that should be undertaken in a certain order, at a given time, prioritizing children's education until well into the 20th century. Educational institutions normalized narratives of race, gender, and normality that sustained colonial power structures. Non-whites and women were presented as less rational, and unable to undertake advanced academic learning (Goetschel, 2007). Consequently, struggles to expand education – both in form and access - paralleled struggles to alter society, as changing how a society is educated has the potential to liberate and transform its members.

Women's education was led by the Catholic church after independence, reserved just for women of the elite, who were taught 'useful knowledge' for their domestic role, based on attitudes of piety, modesty, and honor so they might become 'gentle wives and mothers' (Soasti Toscano, 2001 quoted in Oviedo, 2013, p. 104). Education for women saw some expansion in the 20th century (Goetschel, 2007), affecting productive processes and the structures and dynamics of the family, care, and the state. Feminist scholars critiqued patriarchal narratives embedded in mainstream and critical pedagogy and highlighted the need to analyze the experience of women as students and educators, as well as the curricula content (Cox & Pascall, 1994; Hughes, 1995). The Organic Educational Law passed in Ecuador after the 2008 constitution acknowledged education's role in protecting women against violence and clarified the responsibility of the state in education noting that the state must 'Ensure that all educational entities develop an education in citizen participation, enforceability of rights, inclusion, and equity, gender equality, sexuality and environment, with an intersectional vision and a focus on rights'

(LOEI, 2011. Chapt. 2). From 2012, co-ed education was imposed on traditionally single-sex schools (Últimas Noticias, 2012). This is only a first step, however, as in these formally co-ed schools, boys and girls are still taught different curriculums in certain areas (Oviedo, 2018).

Meanwhile attempts by indigenous peoples to develop their educational institutions with their own pedagogy and epistemology, in their mother tongues, were severely repressed until late in the 20th century (Oviedo, 2018). State indigenous educational policy focused on literacy in Spanish, not in indigenous languages, and the political nature of education meant that rural, non-white populations received less educational funding. Intercultural and bilingual education became a new educational focus in the late 20th century. Interestingly, Intercultural Bilingual Education has a lower female school dropout rate in comparison to the regular state system (Oviedo, 2018, p. 133). The philosophy and praxis of this alternative education, in particular how it can be mainstreamed, is still an issue of contention in local and national politics. More importantly, for this paper, the focus on bilingual-intercultural education remains on children, implementing this model with adult students requires further conceptualization.

Paulo Freire's insightful criticisms of the educational system focused not only on who has access to education but on what that education involves and how it takes place. Freire saw the student not as a recipient of education, but as an active member of the educational process (Freire, 1978). The Freirean proposal is based on the fact that every individual can, from reflection on one's reality, build knowledge. Thus, the axis of this emancipatory education considers the individual as a reflective and critical entity capable of questioning the environment that surrounds them and the world in which they live (Oviedo, 2023). Emancipatory education is 'basically the pedagogy of men who are engaged in the struggle for their liberation' (Freire, 1978, p. 52). This opposes colonial educational models, which rely on what Freire calls banking education, in which the educator deposits knowledge in the student – tell students what they need to know and do not acknowledge the students' experiential knowledge. Intercultural bilingual education sees education in one's language as central to accessing and sharing one's own knowledge. The focus here is not just on learning the same material differently or with new tools but on rethinking what is learned, rethinking what knowledge is. However, this deeper change can be lost if the focus is limited to language and participation.

The 21st century in Ecuador has seen a further expansion in the conceptualization and application of educational inclusion to consider education more holistically and to advocate for inclusion along different dimensions such as gender, ethnicity, age, culture, religion, as well as considering capacity, affective and sexual orientations, class, disabilities, and migration (Salas Guzmán & Salas Guzmán, 2016). The acronym of DEI – diversity, equality, and inclusion – has become increasingly mainstream, with a blooming industry of DEI consultants guiding educational institutions on 'how to do DEI'.

But DEI has not yet brought us to education's full potential. In part because so many are still excluded. 'Who is excluded?' from education in Latin America Guillermo Ruíz wonders. The list is long:

> Many and for many reasons: the poor, peasants, sectors of the informal economy, the unemployed, indigenous peoples, ethnic, linguistic and religious minorities, people from LGTBIQ collectives, refugees, illegal immigrants, among others. A social stigma weighs on these populations that contributes to increase the mechanisms of exclusion, all of which are expressed in the school systems (Ruíz, 2022. p.1).

These exclusions reflect existing fields of power – gender, nationality, and ethnicity, among others - and serve to establish education's boundaries.

International organizations note that 'one of the ends of inclusion is to confront exclusion and social segmentation, which is why one of its main hallmarks is access to diverse schools, which are the foundation for advancing toward more inclusive and democratic societies' (UNESCO, 2007, p. 39), yet structural inequalities, typical of capitalism, and especially of dependant capitalism (Rada Argol, 2014), limit or make it impossible for most countries to achieve this inclusion by increasing the number and diversity of its educational institutions.

Periphery and semi-periphery countries struggle to grant educational inclusion as a right. Even in those countries where the legislation has generated regulations for inclusive education, either from compliance with international agreements or from the modification of standards in education laws, adequate implementation has been difficult or impossible. This is what we have noted with non-gendered and intercultural bilingual education in Ecuador (Gobierno de la República del Ecuador, 2021). However, it is not just because there are still exclusions that education lags in its potential. It is also the case that 'inclusion' is not enough.

What does it mean to belong?

Behind the policy challenges to legislating and implementing inclusive education lies the very question of what inclusion means. While inclusion is presented in opposition to injustice and social exclusion, these concepts are polysemic. Social exclusion is associated with *marginality*, with being excluded from the core, a term developed by Park in 1928 (Ruíz, 2022). Both inclusion and exclusion are associated also with the normal/abnormal, following the normalizing and clinical bases that arise from modern colonial rationality, obsessed with classifying and demarcating reality and 'normal/abnormal' subjects to establish and validate hierarchies (Mara et al., 2021). To be excluded from education, therefore, is not only about lacking access to resources or credentials but also about being labeled as somehow less than the ideal normal. As deficient. To be included, on the other hand, is presented as a route into the core, an escape from marginality. However, inclusion can also mean compliance with the power structures.

Moreover, inclusion and exclusion are in constant change, they are unstable, redacting their borders in relation to individual and collective processes. The power structures that determine inclusion/exclusion have historical roots in the colonization processes (Gómez Hernández, 2018). Colonial practices affected not only the former colonies but also the metropolis. The concept of race organized colonial societies from a basis of inequality and provided a color grading of power that still pervades modern postcolonial societies (Quijano, 2014). In Ecuador to be educated is assumed as being white/whiter. As Clark notes '...by definition Indians were seen as ignorant because it was assumed that Indians who were educated would automatically become mestizos' (Clarke 1998, cited in Roitman, 2009)

As Armijo-Cabrera states, while notions of inclusion and exclusion in education have become mainstream in academia and policy-making at an almost global level, when deconstructed these concepts reveal their political dimension, revealing implicit meaning and connotations (Armijo-Cabrera, 2018). Armijo-Cabrera thus posits questions about how we understand inclusion, beyond its semantics:

> What does inclusion mean? Inclusion in what? What is included (dimensions, opinions, borders)? Why do we speak of inclusion? In contrast to what is one included? From where do we speak about inclusion (discipline, field, theoretical referents)? What type of study

> are we undertaking (type, objective, theoretical-methodological focus)? How are educational policies and pedagogical practices concretized in the investigation units? (2018, p. 3, authors' translation).

To these questions we might add, how can a population oppressed by the values and economic forces of a state be included in the educational system that embodies these values and forces? Put differently, we face questions of epistemic injustice (Mignolo, 2009; Grosfoguel, 2007) as the oppressed are asked to learn to use the tools of the master (Lorde, 2018) rather than having their own tools valued.

Thinking of liminal belonging instead of inclusion

We face a paradox: the need to include populations in educational systems that contribute to the very structures that exclude them, since inclusion presents a path toward reconstructing education into its liberating potential. Moreover, we note that it is not enough for these populations to be 'in' the classroom. For education to change, they must be active actors in the education. They must belong to the educational process.

Theories of mestizaje can help us to think of a complex, non-binary way of belonging to a space of inherent inequalities and contradictions. These theories can also help us think about the possibility of belonging to multiple, contradictory spaces, in a manner that can be subversive and progressive. Mestizaje refers to ethnic mixture in Latin America – a mixture that emerged from the violent conquest of the Americas by Europeans. The mestizo narrative of inclusion created by Latin American states served to obfuscate and justify racial, gender, and economic inequalities created in the colonization process. Inclusion to the state was granted but only by excluding indigenous and African roots. Mestizaje became infamously 'an all-inclusive ideology of exclusion' (Stutzman, 1981). Yet from this space of inequality, injustice, and exclusion through inclusion, mestizos have found new ways to belong, at times solidifying, and at times questioning the boundaries of what a mestizo is.

How do individuals belong to the mestizo state? Belonging is dynamic and problematic. It is not a given and it is, in fact, not always desired, as belonging to the state requires an acknowledgment and acceptance of the structure and labels created by colonial powers. Gloria Anzaldúa (2012, p. 99-102) proposes that mestizas, in the borders, walk between cultures and are in all cultures at the same time, proposing a liminal, complex, multiple, and contested belonging:

> Because I, a mestiza,
> continually walk out of one culture
> and into another,
> because I am in all the cultures at the same time…

Anzaldúa continues that it is not just a matter of moving between spaces and inhabiting a liminal land of contradictory overlaps, but mestizaje consciousness is also a complex interaction with the binaries that create boundaries, challenging these in an embodied struggle for ultimate non-bounded inclusion:

> it is not enough to stand on the opposite river bank, shouting questions, challenging patriarchal, white conventions… The work of *mestiza* consciousness is to break down the subject-object duality that keeps her a prisoner… (Anzaldúa, 2012).

The mestiza consciousness, as presented by Anzaldúa, guides us to rethink belonging as dynamic, as a process not only of opposition but of reconstruction, questioning, challenging, and creation. This is belonging in liminal spaces, where you are and are not part of a community, where your very existence questions what the community stands for and who else should be included. It is not a simple, passive inclusion but a process of contestation. This conception of mestizaje is in line with decolonial thought, because it questions and problematizes mestizo as a homogenizing concept (Stutzman, 1981), a useful tool to 'Europeanise' the culturally and subjectively indigenous, as part of modernization toward whitening (Quijano, 2006), erasing diversity to grant hegemony to white domination. This concept of mestizaje assumes mixture most broadly, not as a genetic outcome, but as a human experience resulting from the clash of cultures that is the basis of colonialism.

Borders, liminal spaces, are inherently queried, and also the most radical spaces, as they are where changes can be made to expand who can belong. Freire refers to this potential for the liminal inhabitant when he notes 'To surmount the situation of oppression, [people] must first critically recognize its causes, so that through transforming action they can create a new situation, one which makes possible the pursuit of a fuller humanity.' (Freire, 1978, p. 47). A liminal space reacts and reflects on cultural assimilation educational policies promoted established on behalf of the 'national culture' (Quijano, 2006).

When thinking about how adult students can belong to education, in a manner that allows them to live their lives fully and use education toward social change, this is the belonging we must operationalize. Adult students must consider a complex belonging that does not deny the inherent tensions of participating in an educational system that might discredit certain of their life experiences or communities but faces those tensions and builds upon them. Adult students might struggle to belong to the world of education, with its current rigid norms, hierarchies, and privileged knowledge. Returning to education as an adult, undertaking education while working, or being a non-traditional student, requires a flexible conceptualization and practice of belonging.

This is what Anzaldua's framework adds to previous discussions of decolonizing education and epistemology (Mitova, 2020). Anzaldua's focus on the lived experience 'in-between', constantly changing and adapting, highlights the fact that decolonization is not a single event but a continuous process (Mbembe, 2015, p.15) and that in that process we can find new ways of belonging. This is particularly powerful for adult students who belong to multiple realms and, in Ecuador, those considered of 'mixed ethnicity'.

Negotiating belonging

In our work with adult students in tertiary education, challenges to belonging are a discussion of daily pedagogical practice. When students doubt their ability to continue because of their identity, because of other commitments, or because of the content of the education they are experiencing, we enter a discussion of why and how they belong to the educational space despite these challenges. We negotiate policies to try and create spaces of belonging for our students while supporting their growing critical questioning of the structures that create these challenges.

The following are some reflections on the many ways our adult students struggle to feel they belong and how we have sought to find ways to extend their belonging in education. In our concluding discussion, we will highlight some of the policy implications of these reflections.

Belonging as a woman in Ecuador: gender and caring roles

In Ecuador, gender roles keep women out of adult education. Rethinking gender challenges through a mestizaje framework highlights that the solution is not to try to change or stop traditional female roles, but rather to understand that adult women students might need and want to straddle multiple roles. And this straddling, while challenging, also allows new understanding and knowledge to emerge. In this section, we will engage with the experiences of students in the Master offered by the Faculty of Education in Universidad Andina Simón Bolívar, Ecuador.

Most of these students are primary and secondary teachers who seek a master's degree to advance to management positions in schools or government. These students are women who start their workday at 7:30 in the morning and finish it at 3:30 p.m. They must then go from their schools to the University to attend courses which are taught three days a week from 4:30 to 8:30 p.m. Gender roles in Ecuador mean that these women are also expected to undertake domestic cleaning and caring duties before and after these working and studying hours. They need to support parents, manage their own children's educational needs, and prepare clothes and food for the household. They often go to bed only around midnight. In a few cases, husbands have begun to assume some of these care duties most often, however, these students are burdened with a double workload that impacts their academic performance. 'Sometimes I arrive home after my classes and my husband already has prepared the dinner, but sometimes he arrives even later' (Blanca, 2023). It, unsurprisingly, impacts their physical wellbeing: in class their physical exhaustion is evident, which in turn requires greater exertion from the lecturer to create a dynamic atmosphere.

Since the Covid pandemic, some of the courses have been held online. This has undoubtedly improved inclusion for these female students in multiple ways. First, by decreasing the burden of commuting which particularly impacts students from more marginal neighborhoods. Second, while students note that the face-to-face modality was a richer experience than the virtual one, they state that in the virtual modality they can at least have time to be close to their children and carry out other domestic activities. 'Even if it is not the same, at least I am home, so my kids feel me nearby. I feel a little bit less like a bad mother' (Rosa, 2023). The tension here is between being a student, advancing in a competitive career as a breadwinner, and fulfilling gendered caring roles. Students mention that even when there are other adults to care for their families 'there is nothing like a mother' thus arguing that they cannot be replaced and feel guilt when asking other adults for help.

The question, then, is how can adult women belong in higher education while fulfilling their caring roles. Distance education has helped by allowing them to almost physically be in two places. However, as Blanca underlines:

> Online education is more comfortable for us, going directly from school to home, but, definitely, the quality decreases, despite the teachers' efforts. Dialogue, and debates, that are crucial for education processes in the precise moment it comes (sic), these are not always possible online (Blanca, 2023).

There is a quality trade-off. Moreover, while the physical strain might be improved, the psychological strain is not addressed. Women are still feeling the need to be in two places and feeling unable to fulfill either role. The liminality of mestizaje here would highlight the need to guide our students away from the false dichotomy of two identities, where one excludes the other, and rather to reflect on the knowledge their positions as mothers,

women, carers, teachers and students in Ecuador gives them. What insights this liminality brings to the practice of learning and teaching.

This is a reconsideration of the content of education that allows the possibility of reflecting on their curricular practices and even questioning the limits of 'rational Western' epistemology. Allowing the knowledge of caring to become a point of reflection for pedagogy, revaluing their caring experiences, and refocusing on these experiences as central, rather than peripheral or in competition with their education. This strategy might help breach the practice of the two roles these students are seeking to fulfill, supporting their well-being.

Belonging as teachers: class and labor roles

Adults studying education while working as teachers face a particular hybridity of knowledge, as they learn about the possibilities and goals of education, yet might find themselves unable to practice these due to the political and economic context. The income of some teachers in the Education MA has improved since the reforms to the Organic Law for Intercultural Education (Gobierno de la República del Ecuador, 2021). The salary of those in urban public schools is enough to satisfy basic needs but not to have substantial savings. These teachers have 40 to 50 students from low socio-economic backgrounds per class, in schools with very poor infrastructure. The teachers at these schools must deal with a lack of didactic material, malnutrition, and domestic violence. In academic terms, they also struggle with the deficiencies created by two years of pandemic, for children with very limited home support, which meant a significant reduction in students' skills in almost all subjects 'The pandemic meant one, almost two academic years lost. Despite the efforts and having developed online courses, it was not the same. Now we see all these academic vacuums, students forgot basic content' (Maria, 2023). As students these teachers sit between the theoretical ideals of education, and the reality of poverty limiting students' options while expanding teachers' responsibilities.

On the other hand, teachers from private schools which serve the middle and upper classes, state that their salary is low compared to that of public-school teachers. Within a tacit school hierarchy:

> We feel like we are the "last wheel of the car" because they need to respond to the whims of the students, especially while grading subjects, a practice that is discreetly endorsed by the school authorities, who try to be sympathetic with the students' parents, who "want to see good grades for their children since they are paying high school fees" (Rosa, 2023).

Teachers then become implicit employees of wealthier parents, working to support the class structure to preserve the school's income and their own. As students in education, they are torn between their ideals of teachers as social transformers, and their inability to practice this given economic and power inequalities.

In general, the teaching profession is not valued in Ecuador. 'Nowadays, teachers are seen as those who could not enter the university to study more important careers…or those who could not find work and who opted for teaching as a way to survive' (Luisa, 2023). The devaluing of the teaching profession continues despite recent state policy (2013), which launched a bi-annual invitation for professionals to become primary and secondary public school teachers. The Ministry of Education's 'I want to be a teacher' program had 80,000 applicants by the end of 2013 '…of whom about 19,000 are already eligible [meaning] they have already passed the evaluations and will be able to access the 'merit and opposition' contests to gain a teaching position' (Ministerio de Educación de

la República del Ecuador, 2013). This program appeals to professionals as the government remains the main source of employment. Neoliberal policies have cut down public employment in other areas, making education an attractive option.

Teachers as students, face the contradiction of learning about the importance of education while living in a society that chronically undervalues the work of educators. They are torn between the ideal of theories and the realities of limitation from poverty and class hierarchies. Yet it is from this challenging duality that new insights for pedagogy can emerge. If education is to advance it must do so from the experiential knowledge of teachers in the field, thus pedagogy must prioritize helping students translate their experiences into knowledge that can be shared.

Language, identity, and belonging

Bernstein (2003) states that language is related to social class, with each class managing its own language idiosyncrasies. The language of education often reflects the language of the upper classes, creating a barrier to working-class, migrant, and indigenous students. This means some of our adult students face the additional challenge of learning a new language – whether it is the language of a different class or a different tongue – in addition to learning the subject content. They need to learn to use specific vocabulary and neologisms, to understand and use inferences, and to use language at a level that transcends the contextual reading of texts. They need to use academic rhetoric and conventions. Returning to school as an adult means learning to read quite long texts, an uncommon practice in most adults' working lives. It requires decoding texts with an intricate conceptual organization using a different logic from that needed for daily success in the work sphere.

Several students in the MA program are indigenous persons who work in bilingual intercultural education establishments. Since Spanish is not their mother tongue, they have difficulties reading academic texts that have specific vocabulary, 'Sometimes I need to read twice or even three times to fully understand academic articles. Sometimes I even need to look for the meaning of determined words. It takes me longer for this reason' (Maria, 2023). Above all, they have difficulties presenting their homework and research papers to Western academic standards. 'Even when I understand, the way I write is not how I am supposed to write, so I don't think my work reflects my understanding' (Maria, 2023).

As Maria's discussion notes, language barriers are not only about vocabulary but about modes of communicating, which are cultural, not just linguistic. There are deeper aspects to communication that have to do with the indigenous worldview and cosmology. Helping indigenous students feel they belong to the educational program, therefore, requires rethinking communication, not just in terms of language, but in terms of how information is understood and shared.

> There are some experiences I have with my students that I struggle to translate into Spanish for discussion, but even more, it is difficult to explain ideas and experiences that are different from what people here in the city think is normal (Miriam, 2023).

This discussion calls to question more broadly how education and learning are constrained within Western institutions. University is a Western creation that opposes certain indigenous educational practices that are based on narratives linked to community knowledge and oral culture. There is an incompatibility with a culture of academic writing, where education is done in segmented issues (subjects), organized as such from

Western rationality. Holistic knowledge can appear as opposed to scientific learning, which often overvalues numerical data. Individual argumentation is valued over communal knowledge-sharing and creation. For Indigenous students belonging to 'formal' education can, therefore, feel impossible if it requires them to deny or at least silence their cultural ways of knowing and learning. An inclusive education requires creating spaces where knowledge can be shared in multiple ways – not just in multiple languages – where indigenous knowledge is valued and welcomed.

Many of our students identify as mestizo, not indigenous. As Luisa said:

> I am not indigenous. It is good that there are universities for them, but that is not who I am. Most Ecuadorians consider themselves mestizos and we need an education that helps us understand what that is, without complexes or shame.

Mestizo ethnic identity in the context of Ecuador is an inherently liminal one: mestizos are constantly working to define who they are in relation to or in contrast to other identities. This process of self-definition is energy intensive. However, it can be encouraged as a process of self-reflection and critical historical awareness, from which an understanding of how education in Ecuador must change to overcome its colonial legacy might emerge.

For our adult students – of different economic classes, speakers of different languages, identifying with different ethnic backgrounds – unquestionably belonging to the coloniality of Western education is impossible. Their language, their ways of knowing, and their search for identity, locate them at odds with Western-based institutions that are only beginning to be decolonized. However, it is in the space of engaging with these institutions that new ways of knowing about themselves can emerge and inform future pedagogy. It is in this space that critical realizations about education can crystalize and inform future policies or criticism. As teachers, we stand to learn from the reflections our students bring so that we can jointly build new educational structures that allow belonging.

Concluding remarks

This paper has noted that inclusion and exclusion are two sides of the same coin. Both concepts are expressions of the social organization established by colonialism and remain as its heritage. Inclusion/exclusion is deeply linked to social inequalities and perceptions of otherness. The social exclusion of non-whites from education in colonial days is nowadays the patrimony of the marginal, who can be the non-white, non -western, the poor, some women, homosexuals, neurodiverse… regarded as abnormal, those who struggle and often do not succeed in mainstream education. This paper, then, has focused on how we can rethink belonging in education to overcome this colonial legacy.

Adult student participation in higher education is a matter of justice which can only be achieved by adult students belonging, not just being included, in education. We have argued that we must re-conceptualize belonging as complex, non-binary, and multifaceted, to acknowledge the struggles of our adult students to belong to education. We have highlighted several struggles of belonging: gender, economic class, identity, and language. We will now briefly note possible ways to address some of these struggles to create more flexible spaces of belonging for adult students.

The gendered expectations of female students in the private space, give rise to a struggle to belong to academia with its demands on time and schedules, and the time and energy demands of their roles as mothers, and carers. To help students bridge these two

spaces – of studies and of mothering – one of the authors sometimes shares their struggles as a working mother, helping to make these challenges visible and creating space to help students discuss possible solutions. While the universities provide some training on time management skills, we realized the problem was often not poor management, but time scarcity, and did our best to make deadlines flexible, work around childcare schedules, and support students with compassion and understanding. It was important to engage with students' stories of caring to help them holistically belong to the learning space. At times students came to us with an ultimatum. They felt they could not belong to the two contradictory worlds: the world of caring with its fluid, emotional, never-ending demands, and the world of studies, with its requirement for linear, rational, scheduled work. It was our job, beyond lecturing, to help them navigate a path between the two which required tremendous determination and strength from them as individuals.

In addressing economic class struggles we openly and thoughtfully discussed with our students our reactions to economic disparities and our placing in the hierarchy to help students see educational figures as belonging to more than one class. As greater economic diversity among students is possible, the opportunity for richer conversations that challenge assumptions can take place. There is, however, the need to create safe spaces for students to process the emotional costs of understanding economic injustices. Similarly, we need to consider curriculum materials that allow access in terms of content, language, and language needs.

Considering indigenous students, Universidad Andina Simón Bolívar has agreed to flexibility in the assessment of student tasks. We have also worked on the possibility that indigenous students can present their work in the Kichwa language, the most widely spoken indigenous language in the country. These academic tasks can be graded and checked by indigenous lecturers from the University who speak this language, although this will need to consider the added workload to these lecturers. Thus, this requires institutional support to provide multi-lingual instruction that can help students develop linguistically without undermining their educational advancement. There is further need, however, to more thoroughly consider new models of learning and assessment that are compatible with non-western forms of learning.

These are a few areas that can create tension in belonging to education for adult students. Our discussion of these highlights the need for flexibility – in schedules and teaching – for creativity – in teaching and assessment – and critical thinking about the creation and delivery of education to support diverse adult students in their educational journey.

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Appendix

Interviews

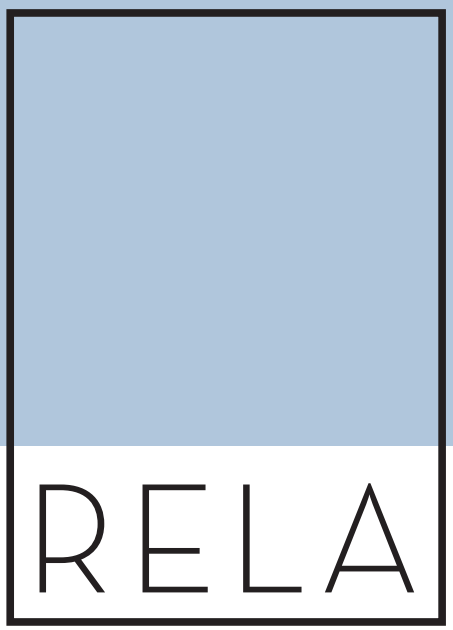
Cristina, Ministry of Education of Ecuador, interview January the 4th 2023, Quito.
Blanca, student. Faculty of Education UASB, focus group, December the 1st, 2022, Quito
Luisa, student. Faculty of Education UASB, focus group, December the 1st, 2022, Quito
Maria, student. Faculty of Education UASB, focus group, December the 1st, 2022, Quito
Miriam, student. Faculty of Education UASB, focus group, December the 1st, 2022, Quito
Rosa, student. Faculty of Education UASB, focus group, December the 1st, 2022, Quito

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.

RELA is published on behalf of the European Society for Research on the Education of Adults (ESREA).



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