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Swedish adult education policy and the world of work: Two generations of human capital influence

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Abstract

Public policies in adult education have been shaped by two generations of human capital influence, each reflecting different assumptions about the relationship between education and the economy. While the first generation, emerging in the post-war decades, has received little scholarly critique, the second has faced extensive criticism for its neoliberal orientation. Tracing these lines of thought internationally, we emphasise the need for a broader historical-institutional perspective to understand what was at stake and why the world of work remains a central component of contemporary Adult Learning and Education (ALE) policy. Using historical institutionalism and the concept of pressure points, we analyse Swedish adult education policy from the late 1950s onward. We show how its adult education system, shaped by both economic and social demands, emerged and has remained largely intact despite grand societal changes and political shifts. At the same time, evolving policies have paved the way for private providers within welfare services, hybridising the Swedish welfare-state-model.

Introduction

The role of human capital theory in shaping adult education policy has been widely debated, yet its historical evolution is often overlooked. There are two distinct paradigms of human capital thinking, each one with far-reaching consequences for educational

policies. The first dates to the late 1950s and runs until the early 1980s when it was gradually replaced by a paradigm that offers a fundamentally different perspective on the link between work and adult education. In contrast to the second generation, which has faced sustained scholarly criticism, the first generation of human capital theory is rarely commented on in adult education literature – a gap we return to below.

The criticism targeting the second generation of human capital theory broadly falls into two categories. First, there is strong resentment against what is seen as a colonisation of adult education and its humanistic and liberatory traditions by an 'economistic' agenda, promoted particularly by the OECD and the EU. Second, this objection is often tied to broader shifts in the political economy, where a neo-liberal value system associated with deregulation, marketisation of public services, reductions in government spending (Marginson, 1997), has been seen to justify policy changes, leading to an abrupt shift in the direction of adult learning systems.

While much of this criticism is valid, it fails to engage with the position of radical adult education scholars. These scholars proclaim that the conditions of work play a fundamental role in the liberatory project that aims to realise working-class peoples' aspiration for economic and social equality and, ultimately, a dignified life (see e.g., Holst, 2021). Further, the criticism directed to the 'economistic' political agenda does not distinguish between different generations of human capital reasoning in adult education throughout the 20th century, nor does it distinguish between geographical and institutional contexts.

To better assess the impact and reach of what is widely regarded as a 'planet-speak' discourse of lifelong learning (Fejes, 2006), a stronger focus needs to be granted to the national conditions within which public policies are introduced, converted and enacted. It is against this background that this article analyses Swedish policy on adult education and its relationship to the role of work during the two paradigms of human capital influence from the 1950s and onwards. Throughout our discussion we argue for the need to anchor the understanding of shifts in adult education policies in the two concepts, pressure points (Brown, 1999) and power mobilisation (Korpi, 1983), set in a historical institutional framework (Thelen, 2004; Desjardins & Kalenda, in press), where the Swedish case helps us understand the pivotal role of partisan politics, labour-market-driven policies and visions of industrial democracy promoting workers' engagement in decision making through a system of co-determination.

The article starts with a brief review of how the link between economic growth and investment in education was understood in the first and second generation of human capital influence. This is followed by an exploration of the criticism directed at the dominant policies on adult education policy during the second generation. Next, we outline the theoretical perspective that is informing our analysis of how Swedish policies on adult education have been linked to the world of work. Our purpose with this article is not to probe the theory of human capital as such. Rather, the article examines human capital as a fundamental dimension of how the dominant understandings of the links between adult education and the world of work has been influencing Swedish public policy. Additionally, we highlight how the political processes and institutional frameworks that emerged in the post-war political economy have remained characteristic of the Swedish Adult Learning System (ALS) while being updated, hybridised and revived over time.

The linking of economic growth and investment in education

In the 1950s economists working within recent developments in human capital theory pointed to a strong link between investments in education and economic growth for both individuals and countries, and argued for the necessity of investing in education and training to respond to technological advancements (Denison 1962; Schultz 1960, 1961). With its promises of achieving both efficiencies and equality through investment in education, human capital was central to the Keynesian political economic paradigm that dominated at the time. The OECD quickly became the prophet of this doctrine, which then served as the topic for the first ever OECD conference on education, Economic Growth and Investment in Education, held in 1961 (OECD, 1961a). At this conference, few perceived any conflicts between economic efficiency and social and economic equality and the broader role of education in a democratic society. As A. H. Halsey notes:

> The new alliance between education and economics holds out the promise of a richer life for millions who would otherwise exist far below their potential human stature. The challenge to governments and their economic and educational advisers to pursue this promise is a noble one. (OECD 1961b, p. 45)

It was not until well into the 1970s that the human capital argument began to be seriously questioned. The labour market had increasing difficulties in absorbing the great influx of graduates with secondary and tertiary education, and not much had been achieved in the struggles against economic, social and, more specifically, educational inequalities (Husén, 1979; Karabel & Halsey, 1977). While educational systems at a post compulsory level had been 'massified' in many Western countries, researchers observed how internal cleavages and differentiation mechanisms helped to preserve the very same social structures that the massive educational expansion was meant to combat (Bourdieu & Passeron, 1979; Trow, 1973).

When the human capital argument returned to the forefront of policy on education it took on a new guise. Instead of addressing economy-wide growth patterns, as had been the case in the 1960s, second-generation human capital was grounded in a micro-economic outlook focused on the individual firm. Economists now argued that technological change functions as a mediating factor promoting public demand for education which should be viewed not only as an investment but also as a factor of production (Welch, 1970; Bartel and Lichtenberg, 1987). Public concern for equality of opportunity, however flawed and fractured it may have been, was soon replaced by calls for greater 'responsiveness' to labour market needs. Hence, the second generation of human capital theory shifted the policy discourse away from adult education as a public good and resulted in a more expansive understanding of educational activities including, initial education, vocational training, workplace learning, and skills development (Brown et al., 2020; OECD, 1989).

The criticism of the economisation of lifelong and adult education

It is notable that the first generation of the economistic argument on human capital does not seem to have been met by much objections from the educational research community, including those from adult education. On the contrary, the first wave of the human capital revolution was embraced and used to argue for establishing institutional opportunities for the adult education population that had not had the chance to pursue post-compulsory

education (Husén, 1979; Härnqvist, 1958, for the Swedish case). This changed profoundly in the 1990s and the criticism has continued unabatedly ever since.

A relatively early article by Bagnall (2000) reflects the common criticism within adult education circles. His concern was that the lifelong learning discourse became the product of economic determinism and that the progressive sentiments of lifelong learning has moved to the background. While Bagnall was observing the situation in Australia, some twenty years later Mandal (2019) made a strikingly similar statement about the situation in India. In the UK, Martin (2003) suggested that lifelong learning enabled the dismantling of welfare through the deconstruction of citizenship. As a result, he argued that adult education had lost its ability to contribute to a more equitable distribution of material and cultural resources among the countries citizens.

Regardless of time and place, the shift towards a neoliberal world view is commonly seen as the main villain in the economisation of adult education policies. However, Griffin (1999a, 1999b) reviewing the European Union's (EU) lifelong learning policies reaches a partly different conclusion. He shares the view that EU's policies have been reduced to employment policies and continuous workforce training where learning has been incorporated into economic and employment policies. Where Griffin stands out is in that he does not automatically equate this development with a neoliberal policy agenda. Instead, he suggests that the supranational organisations reflect what he labels a 'social democratic approach' to lifelong learning where education and training fulfils a welfare function and assumes a major role for the state. In contrast to such a broad social democratic framework, national policy in the UK at this stage appears to reflect more of a 'neo-liberal' approach and, according to Griffin, has become a smokescreen 'to disguise the systematic undoing of the welfare state and social democratic basis of education systems' (1999b, p. 432).

Although contemporary scholars of adult education may disagree on the nature and extent of the neoliberal revolution, there seems to be a dramaturgical meta-narrative unfolding here where the scholarly exercise often boils down to exposing or unveiling neoliberal policy discourse. In recent years, however, a more balanced view has begun to emerge and there has been a healthy debate about whether national and/or supranational policies have softened the hard neoliberalism of the 1980s and early 1990s (cf. Bromley et al., 2023; Elfert & Ydesen, 2023; Mahon, 2010). While few would argue that the political-economic pendulum has returned to the Keynesian or post-Keynesian era – when much of the adult learning infrastructure in the western world was established – there is growing recognition that institutional histories and national policy contexts deserve more analytical attention. This study seeks to support that shift in perspective by examining what in adult learning systems (ALS) in Sweden reflects broader global transformations in the political economy, and what is shaped by distinct national and institutional legacies. Before turning to the Swedish context, we first outline the theoretical framework guiding our analysis.

Theoretical perspective

This study is informed by three partly overlapping theoretical frameworks: Brown's concept of pressure points and trade-offs (Brown, 1999), Korpi's (1983, 1998) writings on power mobilisation and the historical institutional perspective as outlined by Thelen (2004). The basic idea behind Brown's model of skill formation policy is that it reflects both political struggles domestically and the positional competition between companies and among countries on a global scale. Furthermore, the handling of these pressure points tends to reflect dominant tenants of any given political economy, as well as the relative

strength of the various interest groups in any given time and place. To deepen the understanding of the effects of the shifting balance between interest groups in the formation of collective skilling regimes, we turn to classical power mobilisation theory (Korpi, 1983, 1998). Korpi departs from an assumption that in advanced capitalist societies a division exists between the exercise of economic power and the exercise of political power, that is, between markets and politics. In the economic sphere, the main power resource is control over capital assets and the principal beneficiary is 'the capitalist class'. This is not necessarily the case in the political sphere, where power can come from the strength of number of people mobilised through the democratic process (Korpi, 1983). This reliance on numbers and organisational strength favours large collectivises, traditionally that of organised labour. Power resources theory thus argues that labour has potential access to political resources 'which can allow it to implement social reform and alter distributional inequalities to a significant degree' (O'Connor & Olsen, 1998, p. 8). According to Korpi (1998), 'the extent of bias in functioning of the state can vary considerably as a reflection of the distribution of power resources in these societies and thus that politics can be expected to matter, e.g., for the distributive processes in society' (p. 54).

Framed within historical institutionalism, the power mobilisation and build-up of pressure points at a given moment are shaped by foundational conditions that have created specific political institutional arrangements. These arrangements, in turn, guide countries along particular developmental paths (Thelen, 2004). Historical institutional theory thus helps us understand path-dependent trajectories of policy formation while leaving the possibility open for critical junctures and shifts in power relations. Political actions concerning adult learning and education systems tend to take place under certain path-dependent consensus-like rule-conditions that limits the range of possible policy alternatives (Thelen, 2004). Thus, while institutions continue to evolve, they tend to do so in ways that are in line with the routinised path trajectory, something that will be illustrated in the forthcoming sections that address the adult education and learning policies in Sweden during the two generations of human capital influence. However, first we offer a brief description on the sources on which the analyses are based.

Methodological considerations

In order to capture societal pressure points, identify critical junctures and trace the emerging trade-off effects in Swedish public policy on adult learning during the two generations of human capital influence, we examined a range of sources such as Swedish Government Official Reports (*Statens offentliga utredningar*, SOU), responses to these reports, primarily from unions and employer organisations, publications issued by the latter, as well as official statistics from Statistics Sweden. To begin with, we compiled a range of Swedish Government Official Reports on adult education and labour market policy from the post-war period (for a full list, see Appendix). These state-commissioned inquiries were typically led by researchers and policy professionals and were always initiated and financed by the government (Johansson, 1992). The framing of priority issues and public problems in official government inquiries offers a useful indication of which societal pressure points have entered the realm of policy-making. Although the depth and ambition of these state inquiries have faded somewhat over time (Mattson, 2016), they still provide a unique entry point for longitudinal policy analysis, as it remains standard practice to launch government inquiries prior to the preparation of new legislation.

The tradition in Sweden is that organisations representing different societal organisations are invited to provide written response (a so called *remissvar*) to these Official Reports initiated by the Government. Typically, the minister responsible addresses the remissvar in the Government Bill, which provides a clear indication of whose ideas have influenced the proposed policies. In the work presented here we have been particularly interested in the reactions and interventions from the Swedish Confederation of Professional Employees (*Tjänstemännens centralorganisation*, *TCO*) and the Swedish Trade Union Confederation (*Landsorganisationen i Sverige*, LO) as well as those from the Swedish Employers' Confederation (*Svenska arbetsgivareföreningen*, SAF, later renamed *Svenskt Näringsliv*). The remissvar from 1997 and onwards are accessible online (ESV, n.d.), while the previous responses have been collected from the Swedish National Archives (*Riksarkivet*). In addition, a comprehensive longitudinal dataset on the public financing of adult education and enrolment was created using official statistics and old datasets from previous research. This dataset was used as supplementary material to validate interpretations of policy priorities and investments into various types of ALE over time (Nylander & Rubenson, forthcoming).

First generation of the human capital influence: Linking the world of work and adult education policy in Sweden

The human capital framework of the late 1950s and 1960s came to have a profound impact on Swedish policies on adult education, which has to be understood in the context of the reigning political institutional framework. In alignment with general OECD recommendations of the time, the Swedish government initiated a major expansion of secondary and higher education which also opened up new possibilities for the adult population to acquire formal education.

Institutional context

The Swedish political institutional framework during the era of the first generation of human capital influence was characterised by a tripartite policymaking regime governed by a flourishing state-capital-labour cooperation. Although the so called Saltsjöbaden Agreement (*Saltsjöbadsavtalet*) from 1933 between SAF and LO is often referred to as the beginning of the Swedish model, it has a longer history (Rothstein, 1992). Already at the beginning of the 20th century the state showed an openness to the emergent working class and its political ambition (Rothstein, 1992). This position was in line with the revisionists and reformists working-class movement in Western Europe that emerged in the late eighteen hundreds in opposition to revolutionary Marxism (Hansson, 2019). Inspired by these ideas the Swedish liberal-social democratic government set up a committee exploring industrial democracy as a compromise between capital and labour under the leadership of Ernst Wigforss in 1919. While Wigforss's ideas for the development of industrial democracy were not embraced at this turbulent point in time, they are reflected in Saltsjöbadsavtalet and the Swedish model as it evolved in the postwar period.

Faced with complex challenges and the need to reach decisions through compromise, politicians adopted a corporatist strategy that became a cornerstone of the Swedish model. In this model much of decision making over crucial policy areas like education and labour market policies were left to national boards where labour and employer associations were

represented. As Claus Offe (2018[1984]) notes, this model assumes a secure state not feeling threatened by the various associations or political opponents.

The cornerstone in the post-World War II Swedish model is the so-called Rehn-Meidner (hereafter R-M) doctrine, which was introduced at the 1951 Congress of the Swedish Confederation of Trade Unions (LO, 1951). By combining an active labour-market approach and solidarity-based wage policy with a restrictive macroeconomic policy, the R-M model aimed at full employment, price stability, growth, and equity (Erixon, 2010, Lundberg & Turvey, 1952). An active labour market policy was seen as a necessary condition for price stability and promoting structural change as a precondition for wage solidarity. A solidarity wage policy relies on coordinated wage bargaining and assumes that workers with similar work should receive the same pay regardless of the profitability of companies and industries (Lundberg & Turvey, 1952). Wage differences should reflect variations in working conditions and be related to skill demands which in turn would provide incentives for education. A key assumption, according to Erixon (2010), was that equal pay for equal work would put pressure on companies and industries with relatively low profit margins to rationalise or disappear, thus freeing resources for the expansion of dynamic companies and industries. Rehn and Meidner's central thesis, on which they broke with traditional Keynesianism, was that wage solidarity leads not only to equity and structural change but also to price stability (Government of Sweden, 1955). As discussed below, the institutional framework shaped by the R-M model offered a broader perspective on the relationship between adult education and the labour market compared to the dominant neo-liberal discourse. Thus, the R-M model policies integrated economic efficiencies with a concern for broader equality in society resulting in a broader understanding of the kind of adult education that was needed.

Policy context and reform strategy of the 1960s and 1970s

By the 1960s and 1970s two societal pressure points, skills upgrading and social inclusion, came to dominate the policy agenda. The urgent need to address skill shortages in the adult population had its roots in a highly selective and hierarchical educational system. As a result, the proportion of university graduates and high school completers among Sweden's economically active population in 1960 was low compared to other industrialised nations (Sohlman, 1976). While Sweden's labour market resembled West Germany's, its educational attainment mirrored Portugal's. School reforms in the late 1950s and 1960s expanded the system but also exacerbated intergenerational inequalities. LO and TCO therefore argued that those who were paying for the expansion of primary, secondary, and higher education should receive their 'fair share' of the educational resources generated through public taxation (TCO, 1964; LO, 1969). With industry getting increasingly worried about human capital deficits in the Swedish workforce, the unions demanding that something be done to address intergenerational educational gaps and research revealing that there existed a large 'intellectual reserve' in the adult population (Härnqvist, 1958; Piepenburg & Lundahl, 2024), the government was ready to act.

A municipal adult education system (*komvux)* was introduced, providing adult education equivalent to that offered by primary and secondary schools (Government of Sweden, 1967). This legislation is emblematic of the adult education policies of the era, emphasising that the bulk of resources should be allocated to forms of education most likely to enhance the economy. However, this focus should not be interpreted as a narrowly economistic stance. Instead, it represented a continuation of the R-M model's ambition to achieve full employment. Low-skill, low-paying jobs were being

systematically replaced by roles requiring higher levels of education, with the overarching goal of gradually raising living standards to a middle-class level for all.

Adult education was no longer a marginal activity. The creation of special departments of adult education within the Ministry of Education and the National Board of Education, along with the establishment of a separate budget post, signalled its recognition as an integral but distinct part of the educational system. However, LO and TCO were unsatisfied with the 1967 reform and demanded that more radical steps were needed to encourage their members to engage in adult education (TCO, 1973). Labours' demand for action in the realm of adult education was not an isolated event but part of the much broader radicalisation of the trade union movement in the late 1960s. This shift challenged the longstanding 'reformist' strategy that had traditionally guided Swedish Social Democratic governments and pushed legislation toward the priorities of workers, unions and, to some extent, state bureaucrats and largescale industrial organisations.

At its most radical, these developments represented a profound reassessment of the labour movement's relationship to the question of economic democracy. Rather than continuing to base politics on the assumption that possession of political power alone would provide sufficient opportunities for fundamental changes in working life, there was growing support for the Marxist vision of abolishing private ownership of the means of production altogether. Fuelled by post-war developments and the left-leaning *zeitgeist*, LO too, began to push for more far-reaching measures in order to democratise not only political and cultural life but also the economic sphere. Legislatively, this meant that decision-making processes within enterprises and workplaces was also subject to democratic regulation (Government of Sweden, 1975a).

The government responded swiftly to labour movement demands, setting a new course for Swedish adult education (Government of Sweden, 1970, 1975b). The minister acknowledged the significant influence of LO and TCO: 'Some of the most instructive contributions, in my opinion, have been provided in reports by the Central Organization of Salaried Employees (TCO) and the Swedish Trade Union Confederation (LO)' (Government of Sweden, 1975b, p. 164, our translation). This underscores the trade union movement's growing role in shaping adult education policy, particularly its evolving focus on the relationship between work and education. Notably, SAF also supported many aspects of these reforms, including workplace outreach by union representatives to recruit workers for study circles which at this time began to be embedded in the formal educational system (SAF, 1965, 1970, 1974). The use of adult education as a policy instrument for redistributing resources and mobilising civil society organisations to empower individuals thus gained support across a broad political spectrum well beyond the power nexus of LO, TCO, and the Social Democratic Party (*Socialdemokraterna*).

In the new climate adult education was widely recognised and endorsed from left to right as a tool to empower individuals and strengthen populace of the industrial democracy. In the early 1970s, the go-to government's strategy emphasised redistributing cultural and democratic resources and improving the position of the working classes. The key policy initiatives presented at this time include many efforts to increase the enrolment of so called 'non-traditional students':

- Social benefits for adult students
- Subsidies for outreach activities
- Study assistance for part-time learners
- Legislation on study leave and workplace outreach by shop stewards

Popular education organisations were given a significant role in recruiting blue-collar workers. These measures aimed to shift attitudes toward education and ensure access to continued learning. Between 1970 and 1975, adult education funding increased by 76%, while higher education resources decreased by 19% (Olofsson & Rubenson, 1986). Much of this growth occurred in popular education (*folkbildning)*, reflecting its central role in democratisation efforts, including in working life.

Returning to the theoretical framework, the shift in policies on adult education during the first paradigm of human capital influence should be understood in the context of Korpi's theory on the unions ability for mobilising political power. Similarly, Brown's concepts of pressure points and trade-offs can explain the integration that took place in the way the two dominant pressure points, skills and inequality concerns, were addressed in the adult education policy reforms. Finally, the interaction between state, unions and employers were shaped by an institutional regime with its roots in the 1930s corporatist tradition. This is being reflected in the support, not only by the unions, but also by the employers for most of the adult education reforms during this period.

By the late 1970s, a mix of economic crisis, shifting political priorities and institutional frameworks marked the final departure from ambitions of the early 1970s reforms. The emergence of a new human capital framework in the 1980s brought a significantly altered perspective on the relationship between work and adult education, to which we will turn next.

Second generation of the human capital influence: Linking the world of work and adult education policy in Sweden

The skill formation policy during the second generation of human capital can broadly be divided into two distinct phases, the 1980s through the 1990s, and 2000 and onwards. During these periods the Swedish system of skill formation is undergoing a process of hybridisation, where active labour market policies and universal funding arrangements for adult learning are paired with more rampant marketisation in the provision of welfare services.

Institutional context 1980-2000

The two traditional pillars of the Swedish model, the R-M economic framework and the tripartite policymaking tradition, gradually came under pressure. In 1976, after forty years of uninterrupted Social Democrat reign, Sweden got a centre-right coalition. However, the Social democratic party soon returned to government again in 1982 and immediately introduced a radial new initiative: the Wage Earner Funds (*löntagarfonder)*. This initiative, originally proposed by LO in 1970, aimed to shift ownership from the private to the collective of employees under the auspices of the trade unions. However, this aggressive reform agenda was seen as a threat to private ownership and resulted in a radicalisation of the employer's association who, in contrast to a long tradition of promoting employer-union dialogue, began to withdraw from the corporatist tradition of consensus-oriented policymaking (Lundahl, 1997).

At this time cracks also started to emerge within the powerful LO collective, particularly between the high earning male-dominated metalworkers' union and unions representing the low earning female-dominated sectors (Lundqvist, 2019). In 1983, the metalworkers' union chose to negotiate their own wage agreements, bypassing LO's standardised approach of collectively setting pay increases across the board. Equally

problematic, popular support and backing for trade unions had started to decline, although membership rates have remained very high seen in an international perspective (Kjellberg, 2022). Another challenge to the Swedish model was that the public sector was becoming increasingly questioned and instead of being seen as the solution it began to be regarded as part of the problem. With the political power of the unions weakened, the old institutional model slowly began to change.

Policy context and reform strategy of the 1980s and 1990s

During this period, the pressure points shifted as the economy gradually transitioned into a more post-industrial form. The policy agenda focused on addressing the challenges of a deteriorating economy, marked by sharp increases in unemployment and growing skill deficits driven by structural changes to the labour market. Sweden experienced rising budget deficits and declining productivity throughout the 1980s, culminating in a severe economic crisis in the early 1990s. As a result, the previous radical notion of equality with its redistribution of economic, cultural and social resources in the population, was no longer on the policy agenda. Similarly, the idea of industrial democracy with its aspiration to extend democratic rights to the workplace, was basically a lost cause from here on forward.

Instead, the concern shifted towards economic efficiency, which brought the internal structure of public governance to the forefront of the policy agenda. As the state bureaucracy and public institutions were deemed inefficient there was a growing readiness to experiment with introducing a stronger element of market-mechanism within the provision of welfare services. This resulted in a shift in how public services were organised and caused a gradual marketisation of labour market training and later, also of municipal adult education. The regional offices of the Swedish Public Employment Service (*Arbetsförmedlingen*) were instructed to cease offering labour market training programmes exclusively through public educational institutions. Instead, they were to utilise the provider deemed most appropriate to deliver the training, regardless of whether the institution was public or private. The government was of the view that making a distinction between the ordering authority and the provider would introduce a healthy competition between providers, which in turn should result in a more efficient and flexible system (Wennemo & Hagnefur, 2007). To support this shift toward market-oriented provision, the Swedish government transformed the Labour Market Training organisation (*AmuGruppen*, later renamed *Lernia*) into a state-owned public corporation in 1993. The aim was to reduce inefficiencies in state administration, introduce competition, and stimulate innovation in the adult education and labour market training sector (Ringarp, 2020).

To fully understand the Swedish policy context during the second generation of the human capital influence, it is essential to point out that the neo-liberal marketisation trend came with a specific Swedish twist. Thus, despite the neo-liberal influences, the marketisation did not lead to a reduction of the state's readiness to universally fund the adult education activities (Nylander & Rubenson, forthcoming). Further, although the introduction of austerity measures at the beginning of the 1980s hit adult education hard, the cuts were not more severe than what compulsory and secondary education had to face. Finally, the adult education reforms that were introduced during this period in response to the increasing unemployment suggests that the Swedish welfare model was still present, although now weakened, as we show below.

Up until the late 1980s the Swedish discussions on the need for increased participation by the workforce in adult education and training had taken place within a

full employment situation. However, the labour market conditions quickly eroded in the early 1990s resulting in a doubling of unemployment. The response by the newly re-elected Social Democratic government was to introduce the Adult Education Initiative (*Kunskapslyftet*) (Government of Sweden, 1996). It is worth noting that the Bill was not put forward as an educational bill but as a cornerstone of the Bill entitled Special strategies introduced in order to half the unemployment by year 2000. The ambition of this bill was to get the rate of employment back to the levels prior to the economic crises. While Swedish unemployment rate did fall back considerably at the end of the 1990s, the reform itself also had other lingering effects on the Swedish ALS.

The Adult Education Initiative (AEI) can be conceived of as a blend of the old and the new. By today's standards it was a gigantic five-year reform programme that had the ambitious aim to reach 15 percent of the Swedish labour force. The AEI signalled a fundamental broadening of the role of adult education and training in the Swedish active labour market policy. Instead of expanding the traditional labour market training programmes, with their strong vocational focus, the AEI was attempting to raise the general level of education of unemployed and low-educated adults. The ear-marked funding for the AEI initiative allowed the Social Democratic government to once again initiate measures aimed at helping to reach adults who traditionally did not participate in adult education and training, e.g., a new special adult education grant. The AEI was primarily intended for unemployed persons who had not completed a three-year upper secondary programme and who intended to study at a compulsory or upper-secondary school level. While these measures overwhelmingly focused on responding to the need of the labour market, the improvement of educational qualifications among those with a short formal education not only improved their chances to be employed but strengthened their situation more generally

As a consequence of the AEI, the state support for municipal adult education came to triple compared to its support for popular adult education (Government of Sweden, 1999, part 1, Table 4.1). In fact, state support for popular education, adjusted for inflation, decreased by 10 percent during the 1990s. This shift is significant, considering the earlier emphasis on popular adult education as a means to encourage economic democracy through reforms of working life.

During the first generation of the human capital influence employer sponsored education and training was never a public policy issue. This all changed during the second generation, as the ALE landscape began a fundamental reconfiguration. Between 1975 and 1993 the proportion of people involved in employer-sponsored education and training almost tripled and now had more participants than the study circles organised by popular adult organisations (Unesco Institute for Lifelong Learning, 2019). As data started to become available in the late 1980s on who received employer-sponsored education and training it was evident that participation was very unevenly distributed and that the 'LO collective' was not well represented. Moreover, not only did the rate of participation differ greatly by level of occupation but so did the nature of the educational training. As a result, the trade union movement came to see the control over education and training of the work force as one of the most central issues to be resolved. This resulted in a debate similar to what had occurred in the late 1960s causing the unions to once again demand that government intervene in adult education (LO, 1991; TCO, 1988). According to Brown's pressure points perspective and Korpi's power mobilisation theory, it is precisely this kind of push from a strengthened labour union collectives, here represented by Swedish LO and TCO, that puts the issue on top of the Governments' policy agenda. Hence, in response to these external forces the Social Democratic government struck the 1990 Parliamentary Committee on Competencies (Government of Sweden, 1992).

After difficult deliberations and being unable to reconcile the unions' demand for state policy with employers' resistance to stronger regulations, the government presented a national strategy to improve employer-sponsored education and training (Government of Sweden, 1992). The Committee proposed reforms, including increased state involvement in employer-sponsored education. However, with a newly elected right-wing government prioritising other labour market reforms and a weakened trade union movement not able to mobilise enough political resources to change the situation, these proposed reforms were rejected. While this whole proposal fell, it returned in full force some twenty-five years later, but now under a partly different institutional context.

The reappearance of a consensus on upskilling and reskilling

Institutional context 2000-

The tension between the Social Democratic party and LO, on the one hand, and SAF on the other, had subsided during the early 2000 and a softer form of corporatism re-emerged. Driving this development was a diminishing ability of the labour movement, particularly LO, to impact government policies. In accordance with Korpi's (1983) power mobilisation theory we largely see this weakness as a result of declining membership rates. Kjellberg (2022) notes that in the early 2000s, the unionisation rate among private sector employees was comparable to the rate of private sector employers being members of an employers' association. Two decades later, the figure for the former stood at 65%, while 81% of all enterprises were members of an employers' association. This indicates that while Swedish enterprises have remained particularly well-organised, trade unions have seen declining membership. Another shift that affected the education and training of the workforce stems from the changing structure of the Swedish labour market. Over time the dominance of a few large-scale industrial firms has given way to a growing number of small companies in the service sector, which have less possibilities to deliver their own training (Kuuse, 1986; Lundqvist, 2005).

At the end of the 1990s, the social democratic government successfully helped reorganise the business sector through a relaxation of microeconomic regulations, which was met with strong approval from business (Heyman et al., 2019). As a result, the employers were once again prepared to engage in tripartite cooperation – this time from a strengthened position in terms of their ability to exert power in the labour market. In 1997 the social partners completed an Industrial Agreement that laid out the negotiation process for new era of collective agreements. The treaty stipulated that it is the sector's economic conditions that should serve as the starting point for negotiations and that the parties must consider the consequences of wage formation on inflation, employment and competitiveness, a reflection of the employers strengthened position (Korpi, 1998; Wennemo, 2020).

Further, after long negotiations an historical agreement, the Transition and Retraining Reform (*omställningsstudiestödet*), addressed a crucial issue that had remained unresolved for almost thirty years, namely employer-sponsored education and training. The agreement governs reformation of working life, employment security and education and training. In response to demands from LO the framework agreement, reached in 2020, stipulated that it would only take effect if the government agreed to implement certain measures to protect certain rights of the workers. To highlight the significance of the agreement it was dubbed as the New Saltsjöbaden Agreement (*nya Saltsjöbadsavtalet*) and signed in the same place as the historical 1938 agreement between

the social partners. As part of the agreement LO (and the other unions) paid a significant price for the settlement and had to accept many of the employers' demands for a softening of labour regulations, e.g., in employment security.

Contemporary policy context and reform strategies

Two pressure points (Brown, 1999) were particularly acute during this period. The first concerned the growing need for continuous competency development of the labour force aimed at addressing shortages and mismatches between labour supply and demands. In contrast to the 1960s and 1970s this was now less an issue of having to address the consequences of a previous restricted school system but concerned continuous upgrading of the workforce in a globalised knowledge economy. Concerns regarding the provision of competencies have run like a red thread through the last twenty years of the Swedish policy discourse and are being promoted by government, industry and unions alike. The 2002 report from the Ministry of Enterprise (*Näringsdepartementet*) can be seen to have set the tone when it proclaims that because of structural changes knowledge and competencies were becoming ever more important for the individual, companies and society (Swedish Ministry of Enterprise, 2002). While the discourse has been promoted by all sides of the political spectrum there have been some noticeable differences in what kind of reforms different groups are looking for. Thus, LO repeatedly stressed that it would not be enough to improve access to employer-sponsored training, but also wanted the state to expand adult education and labour market training opportunities more generally (Wennemo & Hagnefur, 2007), while the employers looked for something less ambitious. At the same time, neither unions nor the enterprises seemed very vested in the role popular education could play for competence development.

The second acute pressure point relates to the integration of immigrants, particularly refugees, into Swedish society and the labour market. As the number of immigrants increased by as much as 2.5 times between 2000 and 2016, this increasingly became a politically charged issue. The tone was set by the media that gradually came to frame immigration as being primarily an issue related to the economy and public finance and not, as before, a responsibility rooted in human rights, diversity and multiculturalism (Hurtado Bodell, 2024). This should be seen as a signal that Sweden's exceptionalism within this area was waning (Schierup & Ålund, 2011; Rydgren & van der Meiden, 2019).

In view of the dominant pressure points, it should not come as a surprise that adult education policies during the present period have emphasised vocationally oriented education and Swedish for immigrants. The new emergence of a consensus on vocational upskilling and reskilling seems to have centered on what is now called Higher Vocational Education, HVE (*Yrkeshögskolan)*. This is an institution that began in 2001 with the establishment of a National Agency for Advanced Vocational Education and Training (*Kvalificerad Yrkesutbildning, KY*) within the Ministry of Education (Government Offices of Sweden, 2001). This initiative included a special budget earmarked for KY education and consolidated previous advanced vocational programmes within secondary education, as well as some shorter higher education programmes, under one umbrella with the intention of establishing a closer connection with the working world. KY was later replaced by a more permanent fixture in the Swedish educational landscape, the Swedish National Agency for Higher Vocational Education.

As noted in the Parliamentary Committee on the future of higher vocational education, HVE has gradually been prioritised as a cornerstone in the lifelong learning system and is an essential component in the reorganisation of working life (Government of Sweden, 2023). HVE is a decentralised form of education with many providers where

the offerings are planned and implemented in close contact with the employers. They are generally between one and two years in length. The increasing marketisation of the Swedish Adult Learning and Education system is in full play in the HVE sector. While there are still municipalities where a balance exists between private and public providers, particularly in larger urban areas, the landscape is predominantly dominated by private, for-profit organisations.

Turning to the availability of employer-sponsored education and training, the Transition and Retraining Support introduced a new type of student support programme (Government of Sweden, 2022). This programme consists of a public grant and the option of a loan. It can be awarded to individuals aged 27-62 who have worked for at least a total of 96 months over the past 14 years. Additionally, the studies must include at least one week of full-time study. Under this publicly funded study programme students can get 44 weeks of study paid for as long as government authorities determine that the training will enhance the person's future employment prospects and align with labour market needs. Roughly half of the public expenditure during the first budget year of Student Financing for Retraining scheme went to studies in the HVE sector, whereas much of the other recipients obtained training via universities.

Statistics on the recruitment to the expanding segment of HVE show its recruitment has already seen a rising average age of participants as more programs have been rolled out. In 2005, the majority of participants were aged 18-25, but by 2019, this age group made up only 33% of the participants (Ye et al., 2022). This trend of higher average age is likely to continue, given the more generous state subsidies introduced by the new Transition and Retraining Support (UKÄ, 2024). The success of HVE and its integration of workplace learning as a core component have made it a model for other post-compulsory vocational education in Sweden, which has traditionally been more school-based (Dobbins & Busemeyer, 2015). However, more challenges await the HVE sector in breaking the heavy gender-polarisation, which over time, and in contrast to explicit policy aims, has increased (Chudnovskaya et al, 2023).

The second major initiative in the adult education sector during this period relates to Swedish for immigrants. The growing numbers of immigrants, particularly refuges, put much of the focus on the language training: Swedish for Immigrants (SFI). This system has undergone several iterations since the first formal courses for refugees begun at the end of the 1950s. In the 1960s most of these were organised by the popular adult education's study associations. In 1976, a law regulating SFI was enacted, and responsibility for most of the courses was transferred to the labour market sector. As a result, instruction was largely relocated to Labour Market Training centres (AMU-centres) operated by the state.

In 1986 this training was transferred to the National Board of Education. Finally, in 2014 it became part of the municipal adult education system that now came to consist of three separate pillars: elementary adult education, secondary adult education and Swedish for immigrants (Government of Sweden, 2013). The rationale for the reform was a need for a holistic system. By moving the three parts together in a unified system there would be a natural progression for those who first required Swedish for immigrants. By moving SFI into the municipal adult education sector the students would get access to a larger number of providers offering the programme. The price for this seems to have been further marketisation with the municipalities increasingly entrusting private providers to provide the programmes (Andersson & Muhrman, 2022; Holmqvist et. al, 2021).

The effect of ethnic stratification in the labour markets on opportunities for adult learning is also visible in the area of employer sponsored training. While the participation in non-formal employer-sponsored education among the foreign-born population dropped

from 41% in 2011 to 28% in 2022, the native Swedish population saw a much smaller decline, from 62% to 55% (Statistics Sweden, 2024). Similarly, in terms of educational backgrounds, non-formal employer-sponsored education continues to be tilted towards occupations that require higher education qualifications (Statistics Sweden, 2018). An explanation for the low participation rates among foreign-born could be that they often work for smaller companies or are self-employed. So, while recent reforms have improved accessibility to employer sponsored training it is important to stress that there is a persistent pattern of inequality in accessing continuous employer-sponsored education along both class and ethnic lines.

In summary, the way adult education policies have been linked to the world of work in Sweden during the second generation of human capital influence reflects some of the neo-liberal impacts that have been brought up in the international criticism of the dominant policy trends. However, the findings also reveal how the path-dependency of the Swedish welfare model mitigated these influences, something that will be discussed in the concluding section.

Conclusion: Reassessing ALE policy in relation to human capital, neoliberalism, and the world of work

The persistent criticism over recent decades regarding the dominance of economic concerns in adult learning and education (ALE) policies (cf. Bagnall 2000; Brown et al., 2020; Dahlstedt & Fejes, 2019; Martin, 2003) forms the backdrop to this study. It analyses how the world of work has influenced Swedish ALE policies over the past sixty years. In the international literature, Sweden is often seen as a vestige of progressive adult education exemplified, primarily, by a richly financed adult education sector providing generous public funding for popular adult education that serves civil society as an extensive system of second-chance education and a well-developed study aid scheme that covers both shorter and longer studies.

As discussed above, at the heart of the international criticism of ALE policies is a warranted worry that progressive sentiments of lifelong learning and adult education have gradually moved to the background of public policy. However, our case study of Sweden challenges a key assumption in much of the critically oriented scholarship, namely, that economic influence inevitably leads to the colonisation of adult education by a narrow economistic agenda. What has to be acknowledged is that the Swedish policies partly have their roots in another strand of human capital influence that includes the political visions of strengthening democratic influence over labour relations. In fact, the analyses reveal that economic considerations and progressive ambitions run like a red thread through the last half century of Swedish adult education policies.

The findings presented in this study support Griffin's position (1999a, 1999b) that it is a fallacy to assume that adult education policies promoting labour market training must necessarily be driven by a neoliberal agenda. Moreover, such policies do not inherently reflect a narrow view of the role of adult education in labour market training. As illustrated in our results, over a long period of time general adult education programs in Sweden have played a central role in its active labour market policies. This was evident in the 1960s with the introduction of Municipal Adult Education (*komvux*) and again in the 1990s, under the reform agenda of the Adult Education Initiative (AEI). The latter is a particularly interesting case as it occurred during a time when many other western countries were in the midst of neoliberal reform agenda (Bromley et al., 2023) and the Swedish welfare model was significantly weakened (Lundahl, 1997; Erixon, 2010;

Wennemo, 2020). Thus, these reforms, aimed at providing broad formal adult education as a form of labour market training, have served multiple purposes while withstanding some very testing times. Importantly, their role in Swedish policy is not limited to assisting individuals in accessing the labour market. It is also intended to support the restructuring of the labour market itself, by gradually replacing low-paying jobs with better-paying ones, while simultaneously improving the underlaying tax base.

Equality and economic considerations have remained dominant pressure points for policy changes throughout the period. Notably, during the 1970s – arguably the most progressive period in Swedish adult education – funding for popular adult education was greatly expanded. This expansion was repeatedly promoted under the umbrella of economic democracy and labour market reform. This agenda had its roots in the understanding that to further democratise the Swedish society there had to be a gradual democratisation of the economic sphere. This marked a departure from the dominant post-war social democratic strategy which had, up until then, primarily focused on advancing democracy in areas outside the workplace.

The findings suggest that economic considerations in Swedish adult education policy have been shaped by an institutional context that balances economic priorities with equality ambitions. Moreover, our analysis suggests that the Swedish case continues to exhibit strong elements of path dependency (Mahoney & Thelen, 2010, 2015). This can be seen in the policies of the centre-right coalition that came to power in 1976 after forty years of Social Democratic governance. Despite expectations of a policy shift, the new government offered little support for reform proposals coming from the Employers Federation and largely maintained the policy direction of the previous social democratic government (Blyth, 2001). This episode illustrates how the institutional logic of the Swedish model constrained political alternatives – even in moments of apparent political change. Similarly, the approach over time to popular education, adult learning, and continuous competence development is another example of path dependency and the persistent survival of the Swedish model. This resilience can be traced to the historical institutional context within which the model was established and remains embedded. Even after a weakening of the Swedish model the historical pathway still governs the taken-for-granted-approach to policy, as the recent historical accord, the Transition and Retraining Reform in 2022 between the social partners and the state speaks to.

However, it should be noted that the survival of the Swedish model has involved some far-reaching compromises. While the AEI in the late 1990s shared some characteristics of the old structural reform of the postwar period, it also pointed to, and prompted, the subsequent development of rampant marketisation based on public choice principles. Despite this neo-liberal shift, state funding has not been seriously questioned or rolled back. Instead, neo-liberal influence is for the Swedish case mainly reflected in the dramatic increase in the outsourcing of public goods and services to private providers. As a result, Sweden today has one of the most 'marketised' adult learning systems in the world with private corporations running public services in education through procurements, vouchers and individual choices (cf. Dahlstedt & Fejes, 2019; Holmqvist et al, 2021; Ye & Nylander, 2024). Thus, while our overall findings speak to the survival of the Swedish Welfare state in the postliberal era, this survival has come at the 'cost' of the gradual re-commodification of public services and the disembedding of market forces.

Our findings highlight the important role the Swedish corporatist traditions, with its well-organised central unions and employer organisations, have played time and again. The social partners have been able to coordinate the problems of competence development by reaching broad and long-term agreements on these issues (Kjellberg, 2022). These negotiations have always been contingent on shifts in the power balance

and might break down again if either party's deterrence weakens (Korpi, 1983, 1998). Furthermore, the findings suggest that for the Swedish Model to function effectively, a certain balance of power must exist between the partners representing labour and capital interests. Thus, the crisis in the Swedish model, triggered by the introduction of the Wage Earner Funds (*löntagarfonder*) scheme in the early 1980s, resulted in a temporary, but significant, disruption to the model as it had previously been understood. This was a reform launched at the peak of LO's dominance, forcing the traditionally pragmatic Social democratic government to introduce far-reaching reforms that could have drastically changed the ownership structure of the Swedish economy. When LO became weaker and its influence waned, their ability to pressure the government diminished, leading to a normalisation of the balance between the partners. The resolution of this crisis resulted in the gradual evolution of the corporatist tradition and the conflictual consensus often associated with the Swedish model (Lundahl, 1997, Rothstein, 1992; Wennemo, 2020). This reappearance of a new consensus model on vocational education and competence development is hitherto not fully discussed in the power mobilisation literature, which along the lines of second-generation human capital critique, tends to frame the more recent developments in a gloomier light.

On a final note, the conventional concepts such as path dependency, displacement, and critical junctures (Thelen, 2004; Desjardins & Kalenda, in press) offer some useful insights into institutional change, they are less well equipped to explain how policy issues rise and fall in salience, how actors mobilise power, or how conflicts are negotiated. To address this and the dynamics of the Swedish case, we have sought to combine traditional institutional theory with Brown's pressure points framework with Korpi's power-resource theory. This combination allows us to concretise how specific policy agendas emerge in response to political contestation, while also tracing the long-term conditions that have enabled Swedish trade unions to exert considerable influence across shifting institutional arrangements in the adult education sphere. To conclude, this study underscores the deep interplay between adult education, the economy, and democracy. Against the backdrop of the strengthening position of capital interests in current struggles over public policy, we are reminded of Ernst Wigforss's compelling motto from the 1920s that struggles for democracy cannot halt at the factory gates (Wigforss, 1924) – a principle that remains as relevant today as it was a century ago.

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Appendix

Table 1. Swedish commissions addressing ALS topics, 1948-2023, with number of mentions in bills and propositions

SOU (Swedish Government Official Reports)	Title	Number of mentions in bills/propositions
SOU 1948:27	*1946 års skolkommissions betänkande med förslag till riktlinjer för det svenska skolväsendets utveckling* [1946 school commission report with proposals for the development of the Swedish school system]	8
SOU 1954:11	*Yrkesutbildningen* [The vocational education]	7
SOU 1963:74	*Rätt till studiemedel* [Right to student aid]	11
SOU 1965:9	*Arbetsmarknadspolitik* [Labour market policy]	5
SOU 1966:3	*Yrkesutbildning* [Vocational education]	8
SOU 1968:63	*Huvudmannaskapet för de gymnasiala skolformerna* [Responsibility for upper secondary school forms]	3
SOU 1970:21	*Vägar till högre utbildning* [Paths to higher education]	9
SOU 1971:24	*Vuxenpedagogisk forskning och utbildning* [Adult education research and training]	1
SOU 1971:62	*Högre utbildning och arbetsmarknad* [Higher education and the labour market]	1
SOU 1971:80	*Vuxna. Utbildning. Studiefinansiering.* [Adults. Education. Study financing.]	3
SOU 1973:2	*Högskolan* [Higher education]	15
SOU 1974:54	*Vidgad vuxenutbildning* [Expanded adult education]	8
SOU 1974:62	*Studiestöd åt vuxna* [Study support for adults]	9
SOU 1974:79	*Utbildning för arbete* [Education for work]	5
SOU 1975:1	*Demokrati på arbetsplatsen* [Democracy in the workplace]	20
SOU 1979:85	*Folkbildning för 80-talet talet* [Popular education for the 1980s]	3

SOU 1982:29	*Komvux* [Municipal adult education]	7
SOU 1986:2	*En treårig yrkesutbildning* [A three-year vocational education]	5
SOU 1990:54	*Arbetslivsforskning* [Work life research]	4
SOU 1990:65	*Folkhögskolan i framtidsperspektiv* [The folk high school in a future perspective]	4
SOU 1992:7	*Kompetensutveckling – en nationell strategi* [Skills development – a national strategy]	1
SOU 1993:85	*Ursprung och utbildning* [Origin and education]	5
SOU 1999:39	*Vuxenutbildning för alla? Andra året med Kunskapslyftet, del 1 och 2* [Adult education for all? Second year of the Adult Education Initiative, parts 1 and 2]	14
SOU 1999:141	*Från Kunskapslyftet till en strategi för livslångt lärande* [From the Adult Education Initiative to a strategy for lifelong learning]	3
SOU 2000:28	*Kunskapsbygget 2000 – det livslånga lärandet, del 1-3* [The knowledge structure 2000 – lifelong learning, parts 1-3]	3
SOU 2001:40	*En ny yrkeshögskoleutbildning* [A new higher vocational education]	4
SOU 2001:107	*Yrkeshögskoleutbildning – inriktning, utformning och kvalitetskriterier* [Higher vocational education – orientation, design, and quality criteria]	3
SOU 2003:28	*Ekonomiskt stöd vid ungdomsstudier* [Financial support for youth studies]	3
SOU 2003:37	*Geografisk rörlighet för sysselsättning och tillväxt* [Geographic mobility for employment and growth]	5
SOU 2003:77	*Vidare vägar och vägen vidare – svenska som andraspråk för samhälls- och arbetsliv* [Further paths and the way forward – Swedish as a second language for society and working life]	7
SOU 2003:92	*Unga utanför* [Young people outside]	10
SOU 2003:94	*Folkbildningens särart? Offentlighet, forskning och folkbildares självförståelse* [The distinctiveness of popular education? Publicness, research, and popular education educators' self-understanding]	3
SOU 2003:108	*Folkbildning och integration* [Popular education and integration]	3
SOU 2006:115	*Eftergymnasiala yrkesutbildningar - beskrivning, problem och möjligheter* [Post-secondary vocational education – description, problems and opportunities]	1
SOU 2008:29	*Yrkeshögskolan – för yrkeskunnande i förändring* [Higher Vocational Education – for changing professional skills]	0
SOU 2009:28	*Stärkt stöd för studier – tryggt, enkelt och flexibelt* [Strengthened support for studies – secure, simple, and flexible]	6
SOU 2011:72	*Gymnasial lärlingsutbildning – med fokus på kvalitet! Hur stärker vi kvaliteten i gymnasial lärlingsutbildning?* [Upper secondary apprenticeship – with a focus on quality! How do we strengthen the quality of upper secondary apprenticeship?]	3
SOU 2013:20	*Kommunal vuxenutbildning på grundläggande nivå – en översyn för ökad individanpassning och effektivitet* [Municipal adult education at basic level – a review for increased individual adaptation and efficiency]	13
SOU 2013:76	*Svenska för invandrare – valfrihet, flexibilitet och individanpassning* [Swedish for immigrants – choice, flexibility, and individual adaptation]	4

SOU 2015:70	*Högre utbildning under tjugo år* [Higher education over twenty years]	7
SOU 2017:82	*Vägledning för framtidens arbetsmarknad* [Guidance for the future labour market]	3
SOU 2018:71	*En andra och en annan chans – ett komvux i tiden* [A second and another chance – a timely municipal adult education]	2
SOU 2018:78	*Ökad attraktionskraft för kunskapsnationen Sverige* [Increased attractiveness for the knowledge nation Sweden]	4
SOU 2019:4	*Framtidsval – karriärvägledning för individ och samhälle* [Future choices – career guidance for individuals and society]	5
SOU 2019:69	*Validering – för kompetensförsörjning och livslångt lärande* [Validation – for skills supply and lifelong learning]	6
SOU 2020:33	*Gemensamt ansvar – en modell för planering och dimensionering av gymnasial utbildning* [Shared responsibility – a model for planning and dimensioning of upper secondary education]	5
SOU 2020:66	*Samverkande krafter – för stärkt kvalitet och likvärdighet inom komvux för elever med svenska som andraspråk* [Collaborative forces – for strengthened quality and equity in municipal adult education for students with Swedish as a second language]	6
SOU 2021:5	*Ett förbättrat system för arbetskraftsinvandring* [An improved system for labour immigration]	6
SOU 2022:34	*I mål – vägar vidare för att fler unga ska nå målen med sin gymnasieutbildning* [At the goal – further paths for more young people to reach the goals of their upper secondary education]	4
SOU 2022:53	*Statens ansvar för skolan – ett besluts- och kunskapsunderlag* [The state's responsibility for the school – a basis for decisions and knowledge]	1
SOU 2023:31	*Framtidens yrkeshögskola – stabil, effektiv och hållbar* [The Higher Vocational Education of the future – stable, efficient, and sustainable]	1

Quality management in its relation to professionalisation revisited: A landscape shaped by internal and external forces

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Abstract

This paper revisits a theoretical paper on quality published in the adult education journal RELA in 2011. It analyses the relationship between quality management and professionalisation in Germany, drawing on empirical studies conducted after 2011. The diverse and sometimes ambivalent results demonstrate that there is still a conflation of quality management and professionalisation, with the latter occasionally taking a dominant position. Nevertheless, bridges and mutual benefits between both logics are also observed. One significant finding is that the landscape of quality management is not solely determined by external forces such as policies and other professions. The role of trained educators is also crucial and perhaps relatively more important than other professions and disciplines.

Keywords: quality, quality management systems, professionalisation, Germany

Introduction

'Quality' and 'quality management systems' such as EFQM[1] or DIN ISO 9001[2] have been central terms, certificates and activities in adult education and policies on adult education in Germany for at least three decades (cf. Balli et al., 2002; Gieseke, 1997; Hartz & Meisel, 2006; Hartz & Aust, 2024; Klieme & Tippelt, 2008). In Europe, it has been the focus of a number of studies on quality management in adult education, particularly Sweden, which often linked to marketisation (Andersson & Muhrman, 2022a, 2022b; Fejes et al., 2016; Holmqvist et al., 2021; Mufic 2022a, 2022b, 2023; Mufic & Fejes, 2022) and Slovenia (Mikulec & Krašovec, 2016; Možina, 2014). Although evidence provided by empirical research is rather sceptical about its positive effects in

Germany, when looking beyond the organisational level at the learners and their learning (cf. Hartz, 2011; Töpper, 2012), it is unquestionably an established element within the field of adult education. The increased usage of the term quality does not have its origin in the science of education but, rather, in the field of economy (cf. Egetenmeyer & Käpplinger, 2011). Quality management is a term which is very much focused on organisational processes, products and controls by the means of standardisation. These processes and products are defined formally according to criteria or norms standards. Thus, quality seems to be a rather neutral term, which can be used in very different ways depending on the context. The central characteristic of quality assurance or quality development is a formalisation of organisational processes.

The effects of quality management can be studied in various ways. Here, it is intended to revisit a paper by Egetenmeyer and Käpplinger written in 2011, which has been cited by more than 60 researchers and has 17 citations since 2022 alone, according to Google Scholar. The paper seems to have had some impact and resonated with people. The main argument of the paper was that professionalisation and quality management are often conflated. The paper was based on the hypothesis that quality management and professionalisation follow two different approaches.

'Professionalisation' can be understood in different ways (cf. Gieseke, 2010). As in the paper from 2011 (cf. Egetenmeyer & Käpplinger, 2011), it will be used here again as a process and a goal. Such a process and a goal are focused on the process for developing a profession (e.g., adult education) and understanding professionalisation as a process of developing professionalism (cf. Tietgens, 1988, p. 38, or Milana & Skrypnyk, 2009) for people working in a specific field (e.g., adult education). Here, professionalisation means educating and training people who are working in adult education. The goal of professionalisation is to support the professionalism of adult educators. With this professionalism, a further improvement of adult education and a better employment position for adult educators, as with other professions, is intended and envisioned. Interestingly, it is also sometimes discussed whether quality managers have become a profession in their own right (Schmidt-Hertha, 2011). We will return to this argument later.

The paper from 2011 outlined the two approaches with a focus on their two different logics. It ended with a plea from Egetenmeyer and Käpplinger (2011) to acknowledge the boundaries between professionalisation and quality management but also discussed ways of building bridges between them without neglecting their essential differences. This will be discussed again, including empirical studies after 2011 with a focus on quality management. Thus, the guiding research questions are: What insights deliver empirical papers on quality management in relation to professionalisation in Germany? What influence do different external and internal actors have here? The focus will be mainly on studies exploring quality management and not on studies exploring professionalisation in adult education. While it would have also been interesting to study more in-depth studies on professionalisation, this would be beyond the scope of one single paper.

Methods and data

The paper will be revisited by looking at and comparing empirical results of studies on quality management in Germany (Käpplinger, 2017; Käpplinger et al., 2018; Käpplinger & Reuter, 2017; Reuter et al., 2020). The paper here in *RELA* is not a systematic literature review but offers in-depth and substantial insights into empirical research on quality management in Germany, which recent overviews in handbooks in Germany by other authors mention as few empirical studies on that issue (cf. Hartz & Aust, 2024).

Nonetheless, there is more to add (cf. Nittel & Kılınç, 2020; Nittel et al., 2023), which will be also discussed later in the final section of this paper.

A focused and criteria-based re-analysis of three papers will be conducted, which are most likely not known to non-German-speaking readers, on the issue of the relationship of professionalisation and quality management.

The first paper (Käpplinger, 2017) carried out an analysis of qualitative and quantitative research using the theoretical approach of micro-political analysis (Neuberger, 1995). Instead of assuming that organisations react and interact with quality management processes in a uniform way, micro-political analysis explores how different personal groups have different interests, positions and power resources beside commonalities. Eight empirical studies (Behrmann, 2008, 2010; Bosche, 2007; Feld, 2008; Hartz, 2011; Hartz et al., 2008; Kil, 2008; Knoll, 2008) were criteria-based selected and re-analysed with a focus on different personal groups within organisations offering adult education. The method used was qualitative content analysis following Mayring (cf. Mayring & Fenzl, 2019).

For the second paper (Käpplinger et al., 2018), 83 quality assurance agencies offering adult education providers accreditations in quality management were contacted with a quantitative questionnaire containing closed and open questions, of which 27 agencies replied. These agencies were asked questions about the market of quality management (the fees, costs, guidance, etc.) and what role the further education of the providers' staff has. It was considered advantageous to ask these questions to rather neutral observers but ones with many insights into the processes and structures of training providers instead of asking the management of the providers themselves, which might be biased due to legitimising reasons and socially desirable answers. The descriptive data were quantitatively analysed.

The third paper (Reuter et al., 2020) looked at the diffusion of quality management in the field and different subfields of adult and continuing education in Germany. Here, adult education providers in Germany responded to the established quantitative survey wbmonitor,[3] which tries to cover as many providers of adult and continuing education in Germany as possible. Although the response rate was only 9%, 1,755 providers still took part in the survey. The providers were asked questions concerning if and why they had introduced quality management systems in their organisations.

All three papers were re-analysed with the help of content analysis (cf. Mayring & Fenzl, 2019) and focused on the relationship between quality management and professionalisation. The following deductive criteria of the original paper (Egetenmeyer & Käpplinger, 2011, p. 23) were used again:

- Scientifically based specialist knowledge with a specific subject terminology
- Theory-based academic qualification pathways
- Specific norms and codes of ethics
- Professional autonomy
- Client-based and social interactions
- Self-control by professional associations

This deductive approach informed the analysis, although the sub-titles of the following results section outline the main results of the analysis and are not based on the criteria used.

Results

Winners and losers within the (different) professions

Professionals in adult education are not a uniform group but entail different subgroups. A main distinction could be drawn between:

- Leaders and management of adult education organisations
- Staff in programme planning, in charge of organising the provision of training but not offering it themselves
- Staff in administration, such as secretaries or janitors
- Staff in teaching and counselling roles

Although not all staff subgroups can be characterised as a profession or as a semi-profession, it is important to be aware of the different professions and semi-professions. A semi-profession is an occupation that requires advanced knowledge and skills but falls short in comparison to true professions (Milana & Skrypnyk, 2009). Quality management affects different staff groups differently in a number of ways. First, the choice of the quality management system is mainly made by the management. Since there are more than a dozen quality management systems currently available in Germany (cf. Käpplinger & Reuter, 2017), there is a choice. For example, below are the quality management systems and their distribution in percentage points in 674 of the 846 public adult education centres (VHS, Volkshochschulen) in Germany in 2021 (Ortmanns et al., 2023, pp. 56-57)[4]:

- AZAV – *Akkreditierungs- und Zulassungsverordnung Arbeitsförderung...***31.9%**
- EFQM – *European Foundation für Quality Management*.........................**17.6%**
- LQW – *Lernerorientierte Qualitätstestierung in der Weiterbildung*......... **13.6%**
- DIN ISO 9000ff – *Deutsche IndustrieNorm und International Organization for Standardization*..**13.2%**
- LV-VHS – *Quality management system by umbrella organizations of VHS*..**9.7%**
- Regionales oder Landesweites Gütesiegel – *Regional quality management systems*...**6.7%**
- *Diverse internal quality management systems*.....................................**3.9%**
- IWIS – *Institut für Weiterbildung, Beratung und Planung im sozialen Bereich*..**2.1%**
- *Other quality management systems*...**7.0%**

There is no leader in the market of quality management systems, but rather a diverse landscape with many choices. However, the choice is also partly limited, since certain subfields or markets of the adult education system require specific quality management systems, which also results in the fact that some adult education organisations have more than one quality management system since not all systems are accepted by all financing agencies. For example, a provider who wants to offer courses in the field of labour market policies for the unemployed has to choose the quality management system AZAV in order to be able to provide courses in Germany. Thus, the choice for or against certain quality management systems is also a managerial decision resting with the power of the leadership concerning where the organisation wants to focus its work. There are different public sectors, 'quasi-markets' (Hake, 2016) or real markets existing in German adult

education, since there is not one single market (cf. Lewis, 2017). Public administrations require the existence of a quality management system, especially in quasi-market procurements (cf. Holmqvist et al., 2021) for a first selection of applications. Only organisations with a quality management system – and sometimes only with a specific quality management system – are eligible to apply. Thus, the quality management system chosen has the potential to strengthen the position of professions who are working at the level of management.

For staff in the medium tier of training organisations in charge of planning adult education, the choice of quality management system can also define the standards of their work. Since quality management systems often ask for defined and fixed procedures instead of a variety of approaches, this can be used to define how to work and what is, from an organisational perspective, perceived as good work.

The teaching and guiding staff are often the least involved staff group when it comes to defining what quality means in their respective organisations. There is a certain tendency for quality management systems and their tools to put (more) power into the hands of the administrators of adult education organisations with a certain degree of pragmatism (cf. Ehses, 2016).

Nonetheless, it would be far too easy to assume that quality management systems are solely the privilege of the higher levels of the organisation. First of all, it is important to also consider who was included in the quality circles or the working groups who defined good work during the accreditation process. These quality circles and working groups are often comprised of different staff subgroups. Thus, the membership within these groups crosses hierarchies and professions with multidisciplinary group characteristics.

> However, this creates a new 'inside' and 'outside relationship' in the organisation. This can then lead to unintended systemic consequences. Marks et al. (1986) prove in a study on the effects of quality circles that demotivation and losses in productivity increase among non-participants of quality circles. (Kil, 2008, p. 260)

Classical professionals often have an interpretative mandate. They do not work to totally fixed standards but use their expertise in relation to their clients and their often-unique situation. However, in contrast, quality management systems do adhere to fixed standards. This creates a certain tension, and professionals who want to make use of their interpretative mandate can struggle with certain organisational pressures. Thus, professionalism can partly lose its professional autonomy.

Professions are also networks of people who exchange views on how work can be done. Communication and mutual exchange are core elements of any profession, which can also lead to a code of ethics and shared norms within the profession. In contrast, education work can tend to be more solitary, which is especially valid for the teaching and guidance roles. Successful quality management can stimulate such exchanges and help in reflecting how the work is been done and how it can be improved.

> Each course instructor is tasked with providing a curriculum for his or her course. And that is then broken down into individual hours. […] Anyone who is forced to act as lecturer to think about this teaching content and sometimes to list it in such a way that someone else can understand it—they already have one themselves thought process involved. So that gave me something […] What did I … 14, 15 different courses? So, I had to write a lot. But I have that really gave food for thought. (statement from a course instructor: Knoll, 2008, p. 213)

Such remarks partly express ambivalence, since quality reports can lead to a substantial amount of extra work but are also a stimulus for reflecting on one's own practices.

A new sub-profession of quality accreditors and guides?

The establishment of quality management over the last approximately 30 years in Germany has led to the emergence of numerous quality management agencies (see the list on p. 4). These agencies employ their own staff as well as freelancers as counsellors or accreditors. Empirical studies (Reuter et al., 2020) have shown that the most sought-after academic background was university studies of education (64%), followed by economics (58%), while other disciplinary backgrounds such as psychology, sociology, law or engineering were mentioned by less than 15% in a multi-optional question. It is somewhat surprising that university studies of education rank first, although the interdisciplinary composition of quality management personnel is also evident. It is not the case that other academic professions are instituting a 'takeover' of the adult education territory. Instead, a significant fraction of people who studied education are now in charge of quality management, although the new 'profession' of quality managers is also characterised by a multidisciplinary composition, as with adult education professionals generally.

The introduction of quality procedures has perhaps been the greatest monetary blessing for auditors and certification bodies, as a huge 'market' or 'quasi-market' (cf. Hake, 2016) was established within just a few years through public actions and regulations. We estimate that several million euros are spent annually as direct costs for quality management. Thus, it has become its own business area. For some time, scholars in adult education research have even addressed the question of whether quality auditors could be considered a new profession within the field of adult education. Schmidt-Hertha (2011) notes:

> At the same time and receiving far less attention from scientific observations, a new profession is developing in the quality agencies and accreditation associations that, in view of the boom in quality that is understandable in all areas of education development systems, is likely to continue to grow. (p. 164)

It is difficult to estimate whether this new profession has really grown further since 2011, as monitoring systems of adult education staff do not collect data on that group. Personally, we are rather hesitant and sceptical to fully support the argument of a new profession within the field of adult education, since there is no specific academic training or an emerging research community available for such a profession, which would be among the criteria for calling it a profession. Nonetheless, it is important to consider it as a vocation and a stakeholder group with its own interests in its field of business. Other empirical studies see a partly ambivalent and complex role between control and support (Koscheck & Reuter, 2020). The interdisciplinary composition of the group is partly visible, although education and economics are the main pillars in relation to disciplines.

Changes in the further education of the professions

German adult education organisations spend millions annually on certification and recertification costs. In 2015, we estimated €3.2 million per year for direct costs alone, excluding indirect costs such as time spent in internal quality circles, writing quality reports, and attending audits (Käpplinger et al., 2018). While this figure is not substantial in a market estimated to be worth billions of euros in Germany, it is significant considering the often-limited resources of adult education organisations. It is worthwhile to question here what is the quality of quality (Nittel & Kılınç, 2020) and who decides on

it. Perhaps the most important question, however, is whether the costs of quality management are justifiable in a field that is often struggling with austerity and underfinancing. These additional certification expenses could potentially reduce institutions' internal training budgets. However, as Schmidt-Hertha suggests, certification might drive further training, as quality guidelines explicitly require defined personnel development: 'Quality development is undoubtedly a key driver of professionalisation in various pedagogical fields of action' (Schmidt-Hertha, 2011, p. 164). A survey of 13 certifiers from different quality management models in further education revealed that the importance of internal training, such as organisational quality circles, has increased (Käpplinger et al., 2018). This is partly explained as a reactive measure by adult education organisations to refinance certification costs, as external training for staff is considered expensive and a potential area for budget cuts.

While the expansion of internal training opportunities at the expense of external training suggests a positive effect of certification on professionalisation, there is a significant risk that internal training may be too experience-oriented and introverted. Real professionalism requires external training and exchanges beyond organisations and within professions, including scientific knowledge, codes of ethics and professional associations (Käpplinger et al., 2018).

More training does not necessarily have a direct positive effect on staff professionalisation (Käpplinger et al., 2018). Further research is needed, particularly from the perspective of training organisations and the professionals themselves, as information from certifiers may be imprecise and one-sided. A more comprehensive understanding of the precise meaning and effects of quality management on professionalisation and professionalism requires additional empirical research to better comprehend the struggles, bridges, ambivalences and contradictions in this field.

Wide diffusion of quality management to all subfields of adult and continuing education

The field of adult education in Germany, as in many other countries, is diverse and far from uniform. Scholars such as Gieseke sometimes use the notion of rhizomes (Käpplinger, 2015) to describe this dynamic plurality, characterized by growing or decaying networks and new developments. The landscape includes various providers:

1. Public organisations, such as the VHS, which are adult education centres in the tradition of Grundtvig's Danish folk high schools
2. Other public organisations
3. Non-governmental organisations associated with various social movements and communities representing different worldviews
4. Commercial organisations offering adult education services

The quantitative survey by Reuter et al. (2020) demonstrated that the diffusion of quality management among providers in the German adult education sector began in the second half of the 1990s (see Figure 1).

Figure 1. Density of adult education organisations with QMS by year and organisational field. Source: Reuter et al. (2020, p. 107; reprinted with permission)
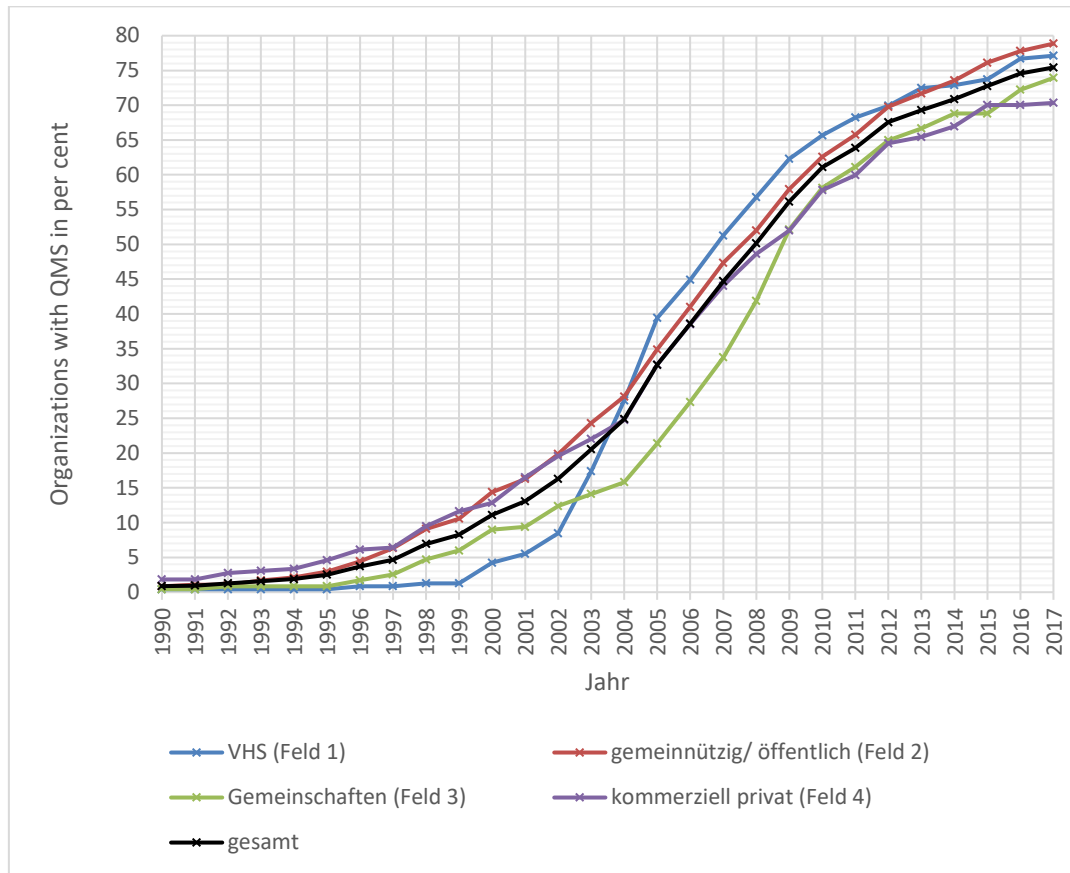
Note. Translation and description of terms: VHS (Feld 1), public adult education centres; gemeinnützig/public (Feld 2), voluntary organisations, such as adult education organisations led by the churches; Gemeinschaften (Feld 3), trade unions, employer organisations, etc.; kommerziell privat (Feld 4), commercial organisations; gesamt, total.

Commercial organisations were the fastest to implement quality management systems. For example, by 2002, more than 20% of commercial organisations in adult education had introduced a quality management system, while less than 10% of public adult education centres had done so. Interestingly, the late adopters later became the ones with an even higher diffusion rate. By 2010, more than 65% of public adult education centres had introduced a quality management system, while less than 60% of commercial organisations were using one. The diffusion rate of quality management systems across all organisations in adult education ranged between 70 and almost 80% by 2017. Public organisations and communities dependent on public co-financing have the highest diffusion rates, while commercial organisations are at the bottom, but still have a diffusion rate of 70%.

Overall, it is almost inevitable that an individual working professionally in adult education in Germany encounters quality management systems. It is even more likely to work with them if one is employed at a public adult education centre. Even in commercial organisations, it is very likely that one will need to deal with quality management systems. How strongly one's professional work is affected certainly varies. A popular critique, supported by the empirical study of Hartz (2011), demonstrated that quality management

is often limited to the management level and organisational procedures, while teaching and learning are much less affected. Sometimes, the effect is rather symbolic; the mission statement is legitimised with quality management, but between certification and re-certification, its effects are much less obvious.

Discussion and outlook

The paper by Egetenmeyer and Käpplinger (2011) concluded with a plea for acknowledging the boundaries between professionalisation and quality management, while also discussing ways to build bridges between them without neglecting their essential differences. Examining the results of empirical research on further developments over the following decade, the connections between quality management and professionalisation have become quite apparent.

The vast majority of organisations in adult education employ quality management systems, although there is also still a minority of roughly one fifth without a quality management system. This is interesting and perhaps worthwhile to study since there seems to still be an option to opt-out from a formal quality management system despite the mainstream trajectory.

The academic discourse connects quality management mainly to organisational education studies and much less to professionalisation (cf. Hartz, 2018). No subfield (public, commercial, or NGOs) of adult education is likely not to use it, making quality management seemingly omnipresent. However, the prevalence of professionally qualified staff might be lower than that of quality management systems in organisations. Organisations appear to refinance quality management costs by reducing external professional development and substituting it with internal training, such as quality circles. While this may have positive aspects and serve as one of the bridges mentioned in the paper by Egetenmeyer and Käpplinger (2011), the reduction in external training could potentially weaken professions, which ideally should also extend beyond individual organisations. For example, the definition of and agreement to share professional codes of conduct beyond organisational boundaries could be important.

The tension between professions and organisations likely plays a significant role, with organisations possibly gaining more influence than professions in adult education. This presents an interesting avenue for further research. It would be naive to assume the relationship between professions and organisations is entirely harmonious.

There also seem to be power struggles between different groups regarding quality management, as some have more influence in shaping the system and its implementation. Quality circle members and those primarily responsible for quality management systems often wield considerable influence. Consequently, quality management systems appear to have the power to restructure relationships among personnel and different groups beyond professions. Management and administration within adult education organisations can leverage quality management systems during implementation as a tool of organisational power to shape or reshape the entire organisation. On a positive note, this could lead to increased interprofessional exchange and greater reflection on one's work.

Quality management systems can be applied in various ways, yielding different effects. While they have an economic core and often lead to standardised approaches to professional work, professional approaches should ideally follow a different logic, one focused on people and clients rather than customers. Although it might be a bit too overly simplistic to equate quality management solely with economisation (Nittel et al., 2023), there is indeed a danger that it is used solely in a mainly narrow economic meaning and understanding. The impact of quality management systems depends largely on the

individuals who implement and supervise them. Notably, a high percentage of these individuals are from the field of university studies of education. This counters and challenges the notion that the field of adult education has been overtaken by people with non-educational backgrounds in economics, sociology, or psychology. While one's field of study does not necessarily dictate future career paths, it is crucial to prepare professionals to engage with quality management systems in a meaningful way. This preparation should emphasize the distinction between quality management systems and professionalisation, avoiding their conflation. Thus, adult education researchers might have to reflect in-depth on how they teach and discuss quality management systems with their students and if there is a need to change that in order that alumni try to not conflate quality management with professionalisation.

A limitation of this paper is its focus on Germany. It would be valuable to explore the situations in other countries (cf. Hartz & Aust, 2024). In the European context, a number of studies on quality management in adult education are available, particularly from Sweden (Andersson & Muhrman, 2022a, 2022b; Fejes et al., 2016; Holmqvist et al., 2021; Mufic, 2022a, 2022b, 2023; Mufic & Fejes, 2022) and from Slovenia (Mikulec & Krašovec, 2016; Možina, 2014). Here, quality and quality assurance are often intensively linked to marketisation and exogenous forces, but it also becomes apparent that different people are affected differently. I agree with the high relevance of such exogenous forces from the fields of policy/administration or commercial actors, but the empirical analysis presented here also makes the point that there are endogenous forces of adult educators profiting and strengthening their positions through the means of quality management. At least, this is the case in Germany and comparative studies might be needed in order to check if this is similar in other countries. If we want to study quality management, we should not assume that the terrain of adult education was colonised solely by outsiders without any or even major involvement of insiders.

However, it would be beneficial to gain additional insights into the diffusion of quality management in more countries or even from a comparative perspective. For example, the quality management certificate Ö-Cert exists in Austria, but there seems to be a lack of studies on that system and its effect. It might be possible that some countries simply lack research on this topic, while the field of practice does exist to similar degrees in countries such as Sweden, Slovenia, and Germany.

The empirical data from Germany provides numerous insights and overviews (cf. Hartz, 2018; Hartz & Aust, 2024; Jenner, 2023), but more research is still undoubtedly needed. It is a limitation of the paper presented here that the analysis was limited mainly to three papers.

Future research could go in several different directions, particularly since there are many quality management systems available. Käpplinger and Reuter (2017), for instance, provided an overview of more than 10 major systems. These systems are often under revision, and there is competition among them to be the most widely used in the field. It would be valuable to investigate which systems interact with professionalisation and how. Some questions to consider include:

1. Do quality management systems tend to dominate professionalisation? Is that valid for all quality management systems or for some systems more or less?
2. Do quality management systems seek a co-existence of professionalisation and quality management beyond conflation? Is that valid for all quality management systems or for some systems more or less?
3. Is there a learning process or progress with the different quality management systems over time that promotes or disadvantages professionalisation?

> 4. What is the quality or inherent logic of quality management systems themselves (cf. Nittel & Kılınç, 2020), and how does it evolve over time?

These questions highlight the need for ongoing research into the relationship between quality management systems and professionalisation in adult education. How is it shaped and re-shaped by the adult education professionals in charge of it?

Notes

[1]   Webpage of the European Quality Foundation (2025).
[2]   Webpage of the DIN-ISO 9001 (ISO, 2025).
[3]   wbmonitor – the continuing education and training landscape from the provider perspective (BIBB, 2025).
[4]   79.7% of all VHS in Germany have at least one quality management system. Simultaneously, the sum of the percentage points results in 105.7%. This indicates that many VHS with a quality management system have more than one system. For example, this can be the case if different financers (e.g., regional financers or federal financers) ask for different quality management systems in order to be eligible to receive public subsidies.

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

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'For all, by all, with all': Directors and programme planners as co-creators of racism-critical organisational development in adult education. A case study at the German Volkshochschule

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Abstract

This article analyses how directors and programme planners at the German Volkshochschule (adult education centre) support racism-critical organisational development. The data is interpreted with qualitative content analysis and based on five interviews conducted with directors and programme planners within one Volkshochschule. In order to research the potential avenues of support, the article employs a theoretical framework based on racism-critical leadership approaches. We argue that, through an interplay of leadership characteristics and leadership actions, two forms of support empirically emerge within the case: (1) an organisational guiding principle of education for all, by all, and with all, and (2) a community-driven programme planning, challenging the programme planning table by supporting communities to co-create their own learning pathways. The findings indicate the central role of directors and programme planners in racism-critical organisational development processes and underscore the necessity of continuous organisational self-critique to address racism.

Keywords: racism-critical organisational development, racism, Volkshochschule, German adult education centre, critical leadership

Introduction

Adult education facilitates the accompaniment of lifelong learning processes in flexible learning environments. The flexibility of adult education becomes increasingly important when it comes to maintaining democratic conditions and dismantling racist ideologies (Heinemann, 2023). Heinemann (2023) notes in this regard that

> adult education has the potential to make a significant contribution to maintaining democratic conditions. Not only in the sense that it can help to address educational inequalities even in adulthood, but also by creating spaces for encounter and social negotiations. (p. 358; authors' own translation[3])

However, Heinemann (2023), referencing Mojab (2011), indicates that alongside its democratising potential, adult education also runs the risk of being part of the reproduction of hegemonic injustices, including racial exclusions (Danquah 2023; Hanson & Fletcher, 2021). As Cervero and Wilson (1999) suggest, this risk arises because adult education and its organisations are influenced by a societal environment shaped by power relations. It is therefore important to address the ambivalence between the reproduction and deconstruction of social injustice within adult education organisations so they may contribute '[…] to a more just, equitable life for all people' (p. 5). The focus on racism in this paper addresses the lived realities faced by racialised people. For instance, findings from a study by the DeZIM-Institute (2025) indicate that 63 per cent of Black[4] women and 62 per cent of Black men report encountering subtle forms of discrimination in Germany.

To address this phenomenon, a power-critical approach to adult education research could be adopted. As proposed by Heinemann and Ortner (2018), this entails integrating perspectives critical of racism and hegemony into both conceptual frameworks of adult educational and empirical research. In accordance with the understanding of a racism-critical perspective on educational questions as outlined by Mecheril (2021), the objective is to get

> […] to the bottom of pathways, locations and opportunities underpinning the effectiveness or non-effectiveness of *race* categories […], categories that are often unintentionally called up by the actors involved, and also [to investigate] questions of whether and how effectiveness of racial thinking can be changed. (p. 46)

Racism-criticism thus describes the ongoing possibility of seeking ways to deal with injustice specifically caused by racism. Central to this approach is the need for ongoing reflexivity to avoid inadvertently reinforcing the very racial categories it aims to deconstruct (Machold, 2011). Moreover, racism-criticism considers perspectives for change in organisational structures and educational practices (Heinemann, 2018; Leiprecht et al., 2011). Utilising racism-critical perspectives as a heuristic framework enables the visibility of paths for organisational self-critique and shifts attention to possibilities for change within organisations (Danquah & Egetenmeyer, 2025). Thus, organisational development draws upon critical organisational studies (Fenwick, 2001; Mojab & Gorman, 2003) and is concerned with the introduction of more equitable organisational practices. Consequently, organisational development is presented in this contribution as a non-linear process, reflecting its etymological roots (derived from the Old French *desvoleper*: *to unwrap*), with a critical potential to unravel power structures, rather than as a phase model (Danquah & Egetenmeyer, 2025).

Various research contributions in adult education analyse possibilities for shaping more equitable organisational development: Human resource management (Fenwick, 2004), programme planning (Cervero & Wilson, 2006; Kuhlen & Egetenmeyer, 2022; Sprung, 2017), and the strategic orientation of organisations (Heinemann, 2018; Öztürk & Reiter, 2017). Moreover, leading staff, such as directors and programme planners, are highlighted as important components of racism-critical change processes, as their actions, skills, and abilities serve as guiding principles for organisational structures and their members (Bernhard-Skala & Lattke, 2020; Morrison et al., 2007). Hence, this article focuses on the potential of leading staff to support racism-critical organisational development processes. The analysis of these possibilities takes place in the field of German *Volkshochschulen* (*VHS,* adult education centres). For more than 100 years, *VHS* have been and continue to be important adult education providers in Germany (approx. 900 centres, providing 285.920 courses in 2021; Lux, 2023). In addition, the *VHS* is a key player with regard to the German 'integration programme' and is one of the main organisations providing 'integration courses' for migrants and refugees (they offer 5.309.577 teaching hours in the area of language courses; Lux, 2023). The importance of the *VHS* also reflects itself in the variety of research focusing on the nexus of *VHS*, migration, and adult education (Dominnik-Bindi, 2024; Käpplinger, 2020; Martin et al., 2021; Thomsen & Weilage, 2023). As the *VHS* is partly state-subsidised and has an educational mandate regulated at different federal state levels (Muders & Martin, 2021), they have a public responsibility to ensure education for all: '[…] Volkshochschulen […] have set themselves the goal […] to be an important component in reducing discrimination […] in the overall social change' (Heinemann, 2018, p. 14; authors' own translation).

The aim of this paper aligns with this demand. The article analyses social exclusions, particularly those based on *race*, within organisations, and enables spaces for racism-critical organisational development on the organisational, programme, and staff level through leading *VHS* staff such as directors and programme planners. Therefore, this article is based on the following research question:

- How do directors and programme planners at the *Volkshochschule* support racism-critical organisational development?

This paper examines the potential for the leading staffs' support by establishing a theoretical framework covering leadership characteristics as well as actions and their interplay. The analysis of this interplay is based on five semi-structured interviews with leading staff within one *VHS* analysed with qualitative content analysis (Kuckartz & Rädiker, 2022). The central findings argue that directors can influence the strategic orientation and vision of the *VHS* at the organisational level and thereby initiate racism-critical guiding principles and actions. Moreover, programme planners can enhance the agency of racialised groups through challenging the programme planning table (Cervero & Wilson, 2001) and making communities into co-creators of their own learning pathways. Based on these findings, the necessity of ongoing racism-critical organisational self-critique is discussed.

Conceptual frame of racism[5] and *race*[6]

As the deconstruction of racism is highlighted in this paper, this chapter focuses on the definition of racism and how it is used throughout the paper. The concept of racism is employed in reference to Hall (2018), Miles (1991), and Delgado et al. (2017). Racism is

defined as a system of meaning that structures and classifies the world in a specific manner. It operates on the principle of Othering (Said, 2003), which involves the construction of a less valued Other and the concurrent construction of the self (Hall, 2018). This process establishes supposed categories of differentiation, based on e.g. somatic characteristics, and solidifies them as natural, meaning they are '[…] not objective, inherent or fixed, they correspond to no biological or genetic reality; rather *races* are categories that society invents, manipulates, or retires when convenient' (Delgado et al., 2017, p. 9). In addition, Delgado et al. (2017) argue that 'people with common origin share certain physical traits […]. But these constitute only an extremely small portion of their genetic endowment […] and have little or nothing to do with […] personality, intelligence, and moral behaviour' (p. 9). They continue arguing that *race* and racism are thus social products of thoughts and relations (Delgado et al., 2017). Expanding on the social construct of *race*, Miles uses the term 'racialisation' (Miles, 1991, p. 99) to describe the construction of *race*, where 'biological' characteristics are incorporated into social constructs that are transferred to groups of people (Hall, 2018; Miles, 1991). In this article, we build upon the conception of *race* as a social construct. We argue in line with Delgado et al. (2017) that, since racism represents a human-constructed and historically developed fantasy about groups of people, the fantasy's deconstruction consequently lies with the creators themselves – humans and their established organisations, structures, and politics (Danquah & Egetenmeyer, 2025).

Leadership in the context of racism-critical organisational development

The implementation of organisational reflection processes can facilitate the initiation of internal change within adult education providers. Self-critical reflection processes are crucial for the identification and dismantling of racial exclusions that may be perpetuated by organisational structures (Ray, 2019). A racism-critical perspective on organisational development presents an opportunity to disrupt the repetition of racism. The ideas that lead to racism can thus be questioned and relearned, as referenced by Mecheril et al. (2022), enabling individual and collective articulations of knowledge to initiate organisational perspectives of change. In this endeavour, leading staff can act as a steering and enabling moment, and they can constitute a central component of the implementation of a racism-critical strategic orientation within adult education organisations (Bernhard-Skala & Lattke, 2020; Welton et al., 2018). In their two-year qualitative study, Ahmed et al. (2006) researched the implementation and effects of diversity concepts in adult education organisations in England, with a particular focus on *race*. The study involved 140 in-depth interviews, focus groups, and observation sessions across 47 different education providers. This comprehensive research represents one of the most extensive qualitative studies of diversity work with a focus on *race* in adult education. Consequently, the study remains a crucial reference to understand adult education, leadership, and diversity, particularly in addressing *race* and racism. In their study, Ahmed et al. (2006) indicate the pivotal role of leading staff in enabling organisational change processes. They conclude:

> A repeated assertion in our interviews was that having leaders who are committed to diversity is crucial to the success of integrating diversity. [...] Rather it is just to say that the commitment of those in leadership positions might have a greater effect on 'what happens' than the commitment of staff who inhabit less senior positions within organisations. (Ahmed et al., 2006, p. 114)

Furthermore, Ahmed et al. (2006) accentuate that, in addition to commitment, leadership actions are crucial for the implementation of racism-critical organisational development. This paper builds upon this idea, establishing a theoretical framework which combines leadership characteristics and leadership actions on three different levels.

Leadership characteristics

In their 2006 study, Ahmed et al. underscore the significance of leaders' *commitment* as a pivotal characteristic in facilitating organisational change. Building on this finding, a detailed re-examination of their results was undertaken to determine additional leadership characteristics relevant to supporting racism-critical organisational development. This analysis identified three further characteristics: *knowledge*, *communication skills*, and *a reflective attitude*.

Knowledge

Ahmed et al. (2006) emphasise the importance of social knowledge, which involves an understanding of how experiences of inequality have shaped present circumstances. Furthermore, the authors argue that racism-critical work requires the application of specific '[…] forms of knowledge, skill and understanding. While experience of inequality is important, such experience also has to be translated into a wider understanding of inequalities and how they structure the social world' (Ahmed et al., 2006, p. 48). Thus, the findings of Ahmed et al. (2006) indicate the significance of both a comprehensive understanding of the concept of racism and a broad social knowledge base for advancing racism-critical organisational development.

Communication skills

In the context of communication skills, the focus is on the proximity of leaders to their staff, learners, and the communities. This closeness enables a sense of being *in touch* with their constituents; leaders have – in order to support racism-critical organisational development – '[…] a specific style of leadership, based on being 'proximate' or 'in touch' with different groups within organisations […]' (Ahmed et al., 2006, p. 116). As a result, leaders become accessible to organisational members and the learning communities, listen to them, and provide them with the opportunity to articulate experiences of racism or uncertainties in dealing with racist situations (Ahmed et al., 2006). This is followed by the idea of leadership '[…] as a form for 'speaking to' rather than 'speaking about' […]' (Ahmed et al., 2006, p. 125). Additionally, the approach of 'speaking to', as proposed by Sheared (1994), enables the visibility of perspectives held by racialised groups and could facilitate the disruption and rethinking of hegemonic organisational narratives.

Reflective attitude

Ahmed et al.'s (2006) findings emphasise the significance of self-reflection and thus, of seeing '[…] issues from other points of view' (p. 48). Consequently, racism-critical leadership also entails the recognition of the necessity to engage with and comprehend the experiences of racialised people. To achieve this, Ahmed et al. (2006) additionally state that this '[…] connection [with racialised people] must be worked at reflexively' (p. 56). Theoretical considerations put forth by Mecheril et al. (2022) complement Ahmed et al.'s argumentation by advocating a *position reflexivity (Positionsreflexivität)* (Mecheril

et al., 2022), which can result in a '[…] reflection on one's position within social relations' (Mecheril et al., 2022, p. 284; authors' own translation). Therefore, a reflective attitude both engages with the perspectives of others, especially racialised people, and reflects one's own social position and its implications (Danquah & Egetenmeyer, 2025). This reflective attitude can be pertinent to individual thinking and organisational routines and practices.

Commitment

Ahmed et al.'s (2006) research results also demonstrate that those leaders who have a strong commitment are important for more equitable organisational change processes. Ahmed et al. (2006) argue that commitment is linked to the idea of being able to positively influence social change. This assumption is then accompanied by challenging organisational structures and practices, and asking '[…] what organisations are for, what […] they do and how they work' (Ahmed et al., 2006, p. 115). However, in order to implement change, '[…] commitment can be 'read' as an action' (Ahmed et al., 2006, p. 118) initiating change on different organisational levels.

Leadership actions

In line with Ahmed et al. (2006), change is made through action. Therefore, this chapter follows a multi-level approach to adult educational organisations (Egetenmeyer et al., 2019) and develops Ahmed et al.'s (2006) call for action further. Areas on which leading staff has influence include the *organisational* level (Heinemann, 2018), *programme* level (Bernhard-Skala & Lattke, 2020; Kuhlen & Egetenmeyer, 2022), and *staff* level (Fenwick, 2004).

Organisational level

Leadership can take action related to the organisation's strategic orientation in order to implement initiatives that include the mission statement (Endrias & Weiß, 2018), public relations, and the complaint system. Additionally, leadership can evaluate and monitor racism-critical measures, formulate goals based on a critical analysis of access barriers (Öztürk & Reiter, 2017), and establish a network to recruit underrepresented employees and participants within the organisation. On the organisational level, leading staff utilise the resources available to them to dismantle racialised exclusions, with the aim to implement racism-critical changes in organisational structures in a sustainable manner (Ahmed et al., 2006; Heinemann, 2018; Öztürk & Reiter, 2017; Zech et al., 2010).

Programme level

Racial inequities also manifest themselves on the programme level (Heinemann, 2015). In order to build a more equitable programme, critical reflections can be seen as a prerequisite (Sork, 2010) for 'negotiating interests in relationships of power' (Cervero & Wilson, 2006, p. 5). Asking questions such as: 'Who is allowed at the table? Who is being heard and who is being ignored? Which voices silence other voices during the planning process?' (Daffron & Caffarella, 2021, p. 18) becomes a part of programme planning to foster 'active and sustained participation in planning of those most affected' (Daffron & Caffarella, 2021, p. 18). Therefore, employing a critical programme planning approach entails listening and building relationships. Programme planning thus becomes a space to 'provide opportunities to examine and foster community and societal change' (Daffron &

Caffarella, 2021, p. 24). Interactive and adjusting models of programme planning following this lead include values and norms as well as different voices at the planning table (Fleige et al., 2019; Gieseke, 2003; Hippel & Käpplinger, 2017). For instance, networking of programme planners in specific communities can contribute to trust building and to addressing barriers of participation for racialised people in adult education programmes (Ahmed et al., 2006; Burnette, 2010; Heinemann, 2015).

In addition, especially during the process of needs assessment, Sork (2005) argues that this assessment can be powerful if it is conducted critically, which also involves focussing the needs of communities to make adult education more accessible and counteract the complex power dynamics hindering a more just society because they '[…] typically favour the already privileged […]' (p. 424).

Staff level

As leading staff is responsible for staff selection and coordination, they can address the underrepresentation of racialised groups, for example among course facilitators and programme planners (Sprung, 2016). To mitigate this, leaders rely on less biased presumptions during the process of recruiting new staff (Öztürk & Reiter, 2017). Subsequently, professional development opportunities can facilitate the questioning of work practices, organisational routines, and staff perspectives.

Figure 1 illustrates the relationship between leadership characteristics and leadership actions. In the context of racism-critical organisational development, leadership characteristics are to be understood as framework and fundamental orientation of leadership actions. Change processes result from the interaction of both: characteristics and actions.

Figure 1. Leadership characteristics and levels of leadership action in racism-critical organisational development. Source: authors' own illustration
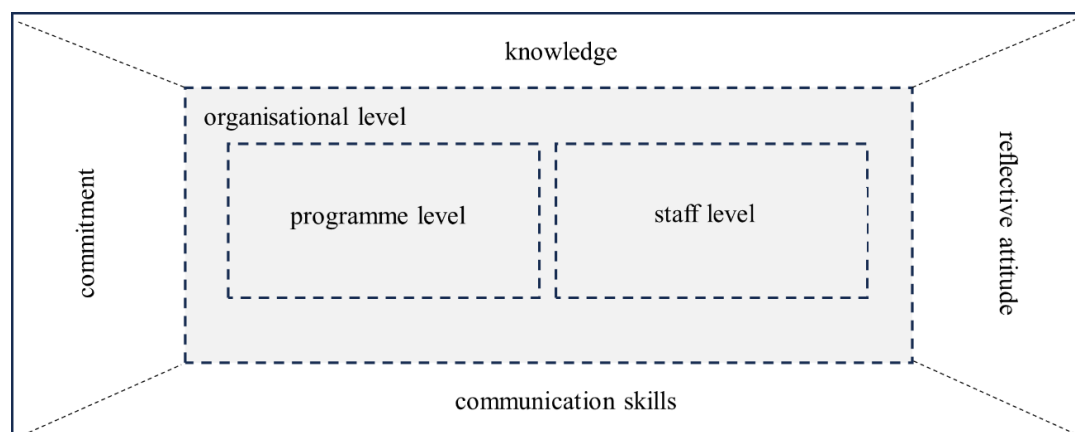
The leadership characteristics: *knowledge, communication skills, reflective attitude,* and *commitment*, and the levels of leadership actions*: organisation, programme,* and *staff*, are used as heuristic for analysing the interview data.

Methodology

The article's research interest lies in analysing support possibilities for racism-critical organisational development provided by directors and programme planners in the context

of the *Volkshochschule* (*VHS*). For this analysis, one *VHS* was selected as a single case (referred to as *Case VHS* in this paper). Publicly available sources about the selected *VHS* (articles in the magazine dis.kurs, online presence, and course programme of the *VHS*), indicated the advanced presence of racism-critical organisational development initiatives within the *VHS*. This led to the choice of this *Case VHS* for the analysis.

A total of eighteen semi-structured interviews were conducted in June/July and November/December 2023 with employees of the *Case VHS*, including both those with and without leadership responsibilities, as well as individuals from the immediate environment of the *Case VHS*. Out of the eighteen, five interviews were selected for this contribution, comprising employees with leadership responsibilities and the power to shape organisational decision making; they are referred to as leaders and leading staff in this paper. The interview sample includes the current and former director of the *Case VHS* and three programme planners. Notwithstanding the change in director of the *Case VHS*, the contributions of the former director remain pertinent, given the pivotal role he*she played in facilitating organisational changes at the *Case VHS*. The interviews were conducted using a semi-structured interview guide and took place in person. The average interview duration was 107:06 minutes. The audio files are available as complete transcriptions created in accordance with the content-semantic rules set out by Dresing and Pehl (2018).

The coding of the data material is based on qualitative content analysis following Kuckartz and Rädiker (2022). Thus, the interview data is coded according to the seven main categories of the research heuristic: *Knowledge, communication skills, commitment, reflective attitude, organisational level, programme level,* and *staff level*. The following codes result from the deductive-inductive fine coding and are assigned to the seven main categories (see Table 1).

Table 1. Deductive-inductive fine coding (authors' own illustration)

Main category	Subcategories
Knowledge	Social knowledge (inductive)
	Knowledge about racism (deductive)
Communication skills	Negotiation skills (deductive)
	Proximity to staff and communities (deductive)
Commitment	Willingness to implement (inductive)
	Sense of responsibility (deductive)
	Hope (deductive)
Reflexive attitude	Willingness to learn (inductive)
	Reflection on one's own speaking position (inductive)
	Empathic understanding (deductive)
	Questioning the familiar (inductive)
Organisational level	Strategic orientation (deductive)
	Financing (deductive)
	Networking (deductive)
	Controlling (deductive)
Programme level	Programme planning and development (deductive)
	Needs assessment (deductive)

Staff level	Qualification and continuing training (deductive)
	Internal communication (inductive)
	Staff structure (deductive)

Subsequently, axial coding, in accordance with Strauss and Corbin (2010), is conducted to establish connections between the categories of the four leadership characteristics and the three levels of leadership action.[7] The axial coding results in the illustration of potential forms of support for racism-critical organisational development in the *Case VHS* by directors and programme planners and are further elaborated on in the next Chapter.

Forms of directors' and programme planners' support in racism-critical organisational development at the German *Volkshochschule*

The analysis of the interview data indicates that forms of support for racism-critical organisational development at the *Case VHS* emerge through the integration of leadership actions and characteristics. The effectiveness of this interaction is reflected in two central results: (1) A guiding principle at the organisational level articulated by the director of the *Case VHS*: *Education for all, by all, with all,* and (2) a community-driven programme planning. Both the guiding principle and the programme planning serve as exemplary means of shaping racism-critical organisational development, emphasising the pivotal role of directors and programme planners as framing and mediating co-creators.

'Education for all, by all, with all' as a guiding principle

At the organisational level, leading staff play a central role in shaping the strategic orientation (Zech et al., 2010), steering the long-term goals of the *VHS* through their influence. Within the framework of organisational development against racism, they can realign existing guiding principles in conjunction with their leadership characteristics, thereby mitigating racial barriers to educational access as the interview with the current director of the *Case VHS* (B8) indicates. The director also seems to be aware of the necessity to adapt the shared self-perception of the *VHS*, which is expressed as 'Education for all' (Deutscher Volkshochschulverband, DVV, n. d.):

> [...] This 'education for all' is somewhat a self-perception of the Volkshochschulen. However, I would say it's not entirely complete. [...] We are trying to expand this: education for all, by all. [...] In the @neighborhood of the *Case VHS@*[8], there are approximately 380.000 individuals who have such diverse biographies, experiences, positions, social positions, that it is impossible and unrealistic for us to cater to everyone. This means that to achieve this, it must be expanded to include BY ALL and perhaps in the long term, WITH ALL. (B8, 17-21; authors' own translation)

The director of the *Case VHS* perceives the current status quo of the organisational self-perception 'Education for all' (DVV, n.d.), as in need of transformation because '[...] it's not entirely complete' (B8, 17). To genuinely provide educational opportunities *for* all, the director expands the idea to include *by all* and *with all*. This reflective stance promotes the participation of adults, who often 'struggle to participate in social [...] decisions affecting them' (Heaney, 1996, p. 5).

By adding *by all* and *with all,* the director advocates a multi-perspective, collaborative approach to adult education. This approach attempts to ensure that voices affected by structural discrimination such as racism are included in the decision-making

process regarding their learning pathways, as well as recognising and respecting their 'diverse biographies, experiences, and […] social positions' (B8, 21; authors' own translation). Distinguishing between the terms *by all* and *with all*, the director emphasises different levels of engagement; however, both aim to include e.g. racialised voices in the *VHS* structures. Following the director's idea *by all*, the *VHS* is understood as a 'platform' (B8, 103) that provides resources for representatives of different marginalised groups, enabling them to create their own learning experiences according to their needs (B8, 103). Subsequently, the idea of *with all* embodies the director's long-term vision: an approach that acknowledges the diversity within these groups and thus aspires to give every perspective touched by structural discrimination the chance to create their own learning experiences rather than including merely a few representative viewpoints (B8, 28). This vision represents a participatory approach indicating a long-term goal, as the director acknowledges his*herself: 'That's a bit of the long-term vision […] *with* all – over the next ten to fifteen years' (B8, 31; 33; authors' own translation).

In conclusion, the extended guiding principle challenges the organisational self-perception and issues an invitation to co-creation through the addition of *by all, with all*; at the same time renegotiating the power position attributed to the *Case VHS* in shaping learning experiences (Cervero & Wilson, 2006). Consequently, in the director's guiding principle, the *Case VHS* becomes a platform providing the necessary resources for participants to create their own learning offers matching their diverse needs.

In addition to the reflective potential articulated by the director of the *Case VHS* through the guiding principle, leadership demands organisational action (Ahmed et al., 2006) to implement racism-critical change processes:

> But this is […] one of my visions, that we truly open ourselves as an institution. [...] Opening ourselves means to me, this education for all, by all. And for that, we have to try things, do things. (B8, 63; authors' own translation)

The director's willingness to put the guiding principle into action is evident in his*her emphasis on 'doing and trying', which indicates his*her commitment to change (Ahmed et al., 2006). He*She perceives the search for new perspectives that counter racial exclusions as a collective process of search and movement. By using the inclusive pronoun 'we', the director portrays a communal unity, attributing responsibility for a collective learning journey to all members within the organisation.

It is evident that the director supports the initiation of structural-organisational development and sees the role of the *Case VHS* as becoming a place of learning for all, by all, and with all. To achieve this goal, the director draws on his*her knowledge, reflective attitude, and commitment to act as co-creator of racism-critical organisational development. He*She also facilitates training opportunities for staff (B8, 118; B18, 47) and initiates leadership forums to address racist incidents (B8, 128; B4, 157; B18, 43), involving both planning and administrative staff.

Challenging the planning table – Communities as co-creators of their own learning pathways

This section focuses on the interplay of leadership characteristics and actions at the programme level. This includes both the programme area with a focus on Afro-diasporic topics and its programme planner (B13), and the initiative for overarching programme planning initiated by the former *VHS* director (B2).

From the ground up: Black people and people of African descent creating their learning pathways

With the establishment of a programme area developed by Black people for Black people, financial and physical resources were made available by the city government (B13, 76) after long negotiations to ensure a sustained response to the needs of Black people. This organisational structural change emerged out of a decolonial educational project led by members of the Black community, demanding education about and the renaming of colonial street names in the neighbourhood of the *Case VHS*. The former director of the *Case VHS* responded to the need of a sustainable incorporation of the Black community's initiative by supporting the establishment of a programme area permanently addressing the needs of Black communities (B2, 67). The implementation of a programme area focused on Afro-diasporic and Black people's needs challenges the power relations that programme planning processes entail (Cervero & Wilson, 2006): While the programme planner in this case only oversees the programme area, its concrete courses are significantly co-planned by various communities of Black people. In order to collaborate with representatives of these communities, according to the interviewee, a proximity to the community is expected.

> B13: [...] And then, during the conversations, you also get / What kind of problems there are? Both in the shelters, but also with (...) asylum-related questions and psychological questions. You get that, but you have to be a part of the community.
> I: [...] How are you part of the community then?
> B13: You communicate with them, you become friends eventually [...] A Nigerian coordinator calls it 'touch'. You have to feel it. [...] they call it touch, meaning, you feel it. [...] Yes, touch, feel the people. (B13, 53-55; authors' own translation)

Building trust through the programme planner's proximity to the community enables the support of communities assessing their own needs. The opportunity to 'touch and feel people' (B13, 55), to empathise with their circumstances (Ahmed et al., 2006), transcends a rational understanding of their concerns, opens up possibilities for empathetic understanding, and supports community building.

However, it is important to note that needs may vary between and within communities, and that there is a risk of homogenising needs (Kuhlen, 2021; Spivak, 2008):

> [...] Do we have ONE Black community? [...] But that doesn't mean that we have some kind of community in all areas, and that we also have the same way of life and work or [a] common cultural part [...]. (B13, 58, 64; authors' own translation)

The programme planner demonstrates an awareness of intersectional struggles by acknowledging the existence of multiple Black life realities and questioning the uniformity of the Black community, while emphasising the overlapping forms of discrimination within (Crenshaw, 1989/2019; Hanson & Fletcher, 2021). The interviewee suggests that, while being Black may unify the Black community, experiences with racism may be shaped by differences in lifestyle, work, or culture (B13, 64). This intersectional perspective informs programme planning, as seen in the programme planner's emphasis on flexibility to address learners' needs at the intersection of *race*, gender, and legal status, referring to Black refugee women (B13, 16). Due to their precarious legal status, issues of class — such as unstable contracts and 'unjust working hours' (B13, 43; authors' own translation) — intersect, making standardised, long-term programme planning, typically practiced within the *VHS* framework, challenging (B13,

14-16): 'And they want our events on the weekends because they work too. […] That means it's often on Saturdays or late afternoons, which are not regular working hours [in the *VHS*]' (B13, 43; authors' own translation). The interplay of leadership characteristics and action is indicated here: the programme planner not only demonstrates intersectional awareness, but also applies this knowledge by adapting the course schedule to the demanded needs as flexibly as the standardised framework permits.

Subsequently, his*her intersectional approach also reflects in the selection of course content together with Black refugee women:

> Sometimes ideas come up during the courses from different participants. […] In the course [...] for example [...] 'midwife'. Then questions arise. [...] okay, we can also do nutrition, [so] there will be a course […]. So, we don't do it as a fixed event because it's [in the programme], but we plan it bit by bit [...] (B13, 14-16; authors' own translation).

Through the iterative, collaborative approach, learners can articulate emerging needs, as illustrated by participants who recognise the importance of nutrition during the 'midwife' course. By distributing decision-making power in content planning, Black refugee women are able to take control over their own learning pathways (Daffron & Caffarella, 2021; Sork, 2005).

To make the needs of racialised people visible, the programme planner adapts his*her work schedules to the needs of the communities, extends his*her availability beyond regular working hours (B13, 39), and is present in community locations (B13, 53).

In addition, the programme planner rethinks traditional *VHS* staffing structures by hiring *coordinators* as intermediaries between the communities and the *Case VHS*. '[The coordinators] do it as freelancers [...]. I decided not to have a permanent assistant' (B13, 31; authors' own translation). By allocating financial resources originally intended for a personal assistant to multiple coordinators from the communities (B13, 31) 'having the same experience' (B13, 29; authors' own translation), the programme planner enables the needs of racialised communities at various intersections to be addressed not as *speaking for* communities, but as *speaking with* communities (Ahmed et al., 2006; Spivak, 1994), giving communities the autonomy to decide on the programme offered:

> [...] the coordinators [...] also reach out to women. They don't just discuss it when they come to us, but they also discuss it with the women, the important areas as well. [...] Because they know them, they come from the same background. And yes, then we have intensive conversations with the respective women who coordinate, and we just facilitate it like that. (B13, 26; authors' own translation)

The coordinators are thus in contact with their own communities to identify needs and, together with the programme planner, other participants, and course facilitators, to design courses and to adapt them dynamically to the needs of the communities:

> At the beginning of the semester [we have] a conference semester. 'What do we want? What are you interested in?' [...] Then we discuss this with our course facilitators, but also with the participants. Then we plan roughly [...] what we are going to focus on in the different areas. And then we start. And it's important for us not only to plan what's officially there, but also to plan on short notice. (B13, 13-14; authors' own translation)

In line with Cervero and Wilson (2006) the programme planner not only involves the learners in their prospective programmes but also supports the creation of an ongoing interactive planning process.

From racialised learners to course facilitators

The inclusion of racialised groups in the form of a community-driven programme planning is also evident in other areas within the *Case VHS*. For example, through an overarching programming (B5, 79-82) in which racialised participants in German language courses are not limited to the deficit position assigned to them as German learners due to their lack of German language skills (B2, 26; Heinemann, 2015).

The overarching programme recognises learners' skills and abilities beyond the German language and enables them to pass on these skills as course facilitators, as the former director states: 'And suddenly they were addressed with their competence, which no one had seen before' (B2, 106; authors' own translation). In this context, the German language deficits often criticised are irrelevant; non-German languages are even welcomed: 'We thought about all this linguicism, the barrier of language, and we said: God, you can teach courses in any language you want [...]' (B2, 106; authors' own translation). The former director's understanding of the mechanisms of racialisation processes, which often manifest subtly in the devaluation of certain languages (Dirim, 2010), creates space for the recognition of migrant-specific skills, such as non-hegemonic languages (Heinemann, 2015). It allows racialised groups of people previously not reached by the *Case VHS* – due to its monolingual courses – to participate in the core *Case VHS* programme and not only in 'integration' and German courses. It also addresses the need for the racialised German-learning community to be recognised for their abilities by becoming course facilitators.

The analysis of the ways in which leading staff supports racism-critical organisational development within the *Case VHS* shows that their strong commitment, knowledge, communication skills, and reflective attitudes create spaces for alternative narratives and actions to find their way into the organisation. These spaces allow for instance the equitable inclusion of racialised communities in the strategic orientation of the organisation and programme planning.

Conclusion

By combining leadership characteristics – *knowledge, communication skills, reflective attitude, commitment* – and levels of leadership action – *organisation, programme, staff* – this paper identifies ways for directors and programme planners to support racism-critical organisational development within the *Case VHS*. The findings serve as exemplary means to emphasise the pivotal role of directors and programme planners in racism-critical organisational development as framing and mediating co-creators, interconnecting their leadership characteristics and actions. The findings also underscore that the collaboration with racialised groups is essential to achieve the goal *education for all*. By articulating self-critical guiding principles, such as *education for all, by all, with all*, *VHS* directors can elevate racialised groups as active participants and co-creators of their own learning journey through e.g. community-driven programme planning. In this context, critical leadership can play a key role in fostering community building, creating flexible and ad hoc learning spaces tailored to the specific needs of the communities. The findings suggest that within these spaces, the role of the programme planner transforms from primarily designing the programme to serving as a moderator who facilitates the framework conditions necessary to support the community's learning pathways. This redefined role requires the programme planner to take a step back; symbolically, he*she might stand behind the planning table, enabling the community to take the lead in shaping their educational experiences.

This process entails building trust between the *VHS* and (potential) participants. In the *Case VHS*, trust is cultivated through genuinely listening and creating a platform that gives space to the articulated struggles of racialised communities. However, continual reflection is necessary to consider which voices within the communities have the possibility to create their learning pathways and which struggles may remain unaddressed despite the community-driven setting.

Moreover, programme planning occurs within a given institutional and societal context (Cervero & Wilson, 2006); thus, the *Case VHS* also acts in response to its unique social context. Situated in a neighbourhood with a rich history of decolonial community activism, the *Case VHS'*s development of a programme area dedicated to Black people and people of African descent emerged from this long-standing tradition. Although this particular context shapes the case, the findings primarily focus on support strategies, offering insights into potential pathways directors and programme planners can reflect on to foster racism-critical organisational development, and not to adopt, but rather to critically adapt the derived ideas to their respective contexts. Future research could further examine interdependences between the context of adult education organisations and their enabling and constraining potential to implement racism-critical initiatives within adult education organisations.

Additionally, focusing solely on the organisational vision and programme planning neither prevents the reproduction of racism within the organisation nor ensures a racism-critical environment. An exclusive focus on directors and programme planners could also risk disengagement from racism-critical organisational development among other staff (Ahmed et al., 2006). It may also overlook other crucial areas fostering change, such as complaint systems or public relations. However, as these areas are rooted in the overarching organisational vision of the director, this paper prioritised analysing the director's guiding principle as part of his*her vision and the core activity of the *VHS* – programme planning. Additionally, the guiding principle 'education for all, by all, with all' could even lead beyond a sole change within the single *Case VHS* and impact its border institutional context, such as e.g. other *VHS* or umbrella organisations.

Moreover, it is vital for adult education providers to engage in an organisational development process that appeals to the responsibility of all staff members and prioritises an ongoing review of organisational structures and processes. This means to continually seek organisational spaces within institutional and structural contexts, to develop and test strategies, and to constantly explore trajectories for change. Racism-critical organisational development is thus a non-linear, complex unravelling process of organisational self-critique that reflexively addresses dynamics of racialisation and continually seeks to navigate through their entanglements.

Notes

[1]   Author contribution: Literature analysis, development of the research question and objectives, development of the data collection instrument, conducting the data collection, preparation and interpretation of data, development of the concept and argumentation of the paper, drafting of the manuscript.

[2]   Author contribution: Supervision of the dissertation and the paper, support in developing the research question, the data collection process, the interpretation of data, and the concept of the paper, feedback on the argumentation and the manuscript.

[3]   The quotes with the addition 'authors' own translation' have been translated from German to English with the help of DeepL.

[4]   'Since 'Black' is not a colour but rather a political designation and a self-chosen identity, it is capitalized' (Chebu, 2016, p. 35; authors' own translation). In this article, reference to Black people is made, among others, to address a specific form of racism, namely anti-Black racism.

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Wild competences: Challenging the neoliberal frame in adult education through collective actions

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Abstract

The article examines the concept of competences from a critical perspective. The authors begin with an analysis of the dominant competences discourse, highlighting its limitations in times of polycrises. They propose the concept of wild competences, acquired through collective actions. These competences are both individual and collective in nature. Unlike traditional competences focused on adaptation within neoliberal frameworks, wild competences are subversive, enabling social actors to destabilise hierarchies, challenge the status quo, and initiate transformative actions. The analysis explores three aspects of wild competences: their foundation for reflexive action, their role in the laboratory of emancipation, and their contribution to reconstructing social orders. Wild competences thus provide alternative pathways for societal change and democratic engagement.

Keywords: wild competences, social movement learning, collective action, polycrisis

Introduction

The competences fostered and reproduced within the educational system fall short in times of crisis. This paper seeks to revisit the discourse on competences and examine those aspects of acquired competences that usually are neglected, both in mainstream educational narratives and in critical approaches. We introduce the concept of wild competences – knowledge, skills and attitudes that arise rather outside the frame of formal education settings. These are competences that we can acquire in alternative learning spaces, e.g., within social movements. These are subversive competences that disrupt the

status quo through radical imagination understood as 'the ability to imagine the world, life and social institutions not as they are but as they might otherwise be' (Haiven & Khasnabish, 2014, p. 3), and collective reflection, paving the way for new forms of action and societal transformation.

We are currently facing a polycrisis (Hausner & Krzykawski, 2023) or even a systemic crisis (Kliman et al., 2011). The 2008 financial crisis and its aftermath exposed this fragility (Gilbert, 2013; Kotz, 2009). We are also contending with the climate crisis (Verlie, 2022; Stimm & Dinkelaker, 2024), highlighted by activists warnings (Bendell & Read, 2021). The COVID-19 pandemic reshaped lives across multiple dimensions (Bengtsson & Van Poeck, 2021), while growing concern surrounds the crisis of liberal democracy and the eroding trust in its institutions (Carpenter et al., 2024). Wars further complicate efforts to manage the polycrisis (Coetzer et al., 2023), forcefully reminding us that violence is one way to reduce complexity when confronting 'wicked problems' - systemic issues that defy simple or rational solutions (see Head, 2008; Bendyk, 2020). As Eschenbacher and Fleming (2021) note, the global and individual dimensions of these crises are deeply interconnected.

We understand crisis as the experience of a breakdown of established frameworks of understanding and action. It exposes the underlying rules of life, which - whether formalised or rooted in tradition, ritual, or custom lose their validity and applicability (Ratajczak, 2020). These crises are not neutral in their impact. As Servant-Miklos (2024) aptly observes, 'patterns of oppression continue to play out: people already marginalised by socio-economic forces, gender, ethnicity, disability, among other factors, feel the brunt of the pain and have the least resources to cope' (p. 1). This unequal distribution of harm is one of the key reasons why we consider grassroot mobilisations central to understanding and responding to polycrisis dynamics. Crisis is an existential experience, a suspension of meaning that compels action and the creation of a new order. Overcoming a crisis requires seeking alternatives and authentic foundations for change. When existing rules lose their coherence, collective action becomes essential (Ratajczak, 2020). While systemic crisis confronts communities with previously unimaginable scenarios, such as national bankruptcy or adaptation to extreme temperatures, the sense of dread remains individual. These are therefore liminal situations that demand a collective response – a shift away from the past's 'obvious reality'. At global, group, and biographical levels such disruptions, where unexpected situations force social actors to reflect, provide opportunities for learning (Alheit, 2021; Eschenbacher & Fleming, 2021; Biesta, 2007).

In this text, we identify competences that may be overlooked in times of relative peace but become crucial during crises. We begin with a critical examination of the concept of competence and its limitations. This reveals a key, often overlooked aspect: competences are not only acquired individually, in service to the system, but also collectively, e.g. within social movements, through engagement in protest. Furthermore, beyond the competences recognised in formal education, activists possess something additional. This surplus, combined with the informal potential for learning, constitutes the so-called wild competences, which we explore in this text.

The competency discourse and its limits

There is no single definition of competence. Most commonly, competence is understood as a category encompassing knowledge, skills, attitudes, and performance abilities, which collectively translate into action in the world (e.g., Bielska, 2014; Queeney, 1997). Competences have become a framework for interpreting contemporary education, posing

challenges for both practitioners and theorists, as not everything important in education stems from formal teaching (e.g., the disposition to learn and socialisation). Commonly, a competent individual, group, or organisation is capable of responding adequately to various situations, which reflects an adaptation to the changing context of life (Solarczyk-Szwec, 2017). In educational practice, competences integrate both academic and upbringing objectives.

Competence as the oppression of education

Competence is generally understood as the result of teaching or training (Cornford, 2005). In this view, it is reduced to the level of school-based knowledge and skills, treated as a value in itself (Męczkowska, 2004).

According to Jurgiel-Aleksander and Jagiełło-Rusiłowski (2013), competence functions in discourse as the language of 'educational administration'. They argue that framing competence as the management of knowledge and skills reflects a neoliberal economic order that confines education to serving the labor market. Within this framework, knowledge is seen as a means to make individuals 'active citizens of the knowledge society and labour market' (Jurgiel-Aleksander & Jagiełło-Rusiłowski, 2013, p. 67). The appeal of this discourse stems from the belief that in a globalised, turbulent world, education fails to deliver its promises, leaving graduates unprepared to meet challenges (Gilbert, 2013). Such an approach to structuring educational objectives results in situations where a competence deficit identified in an individual can be administratively matched with educational offerings.

The term competence is frequently encountered in the discourse of lifelong learning, particularly in European Commission documents on education. Foundational reports by UNESCO, OECD, and the EU define *lifelong learning* as 'any learning activity with an objective, undertaken on a continuous basis and aimed at improving knowledge, skills, and competences' (Comissão das Comunidades Europeias, 2000, p. 3).

Over time, the competence model has subordinated the traditional qualification model (Barros, 2012), which became significant in Western societies in the late 1940s. Qualifications served two main purposes: supporting collective bargaining systems that ranked and classified occupations, and structuring vocational education to focus on knowledge acquisition and certification. The concept of qualifications organised the labour market, operating at three levels: (1) knowledge and skills gained through vocational training; (2) standard job requirements; (3) opportunities for promotion and salary adjustment within professional   hierarchies (Barros, 2012). The qualification-based model was highly structured to the extent that people believed attaining the appropriate level of qualifications would correspond to achieving a specific social status. People trusted that gaining qualifications guaranteed specific jobs and predictable financial compensation, as well as clear conditions for career advancement. This predictability fostered stability, making work a foundation for collective workers' identity. Thus, a trained shipyard electrician entering the workforce knew in advance what wage s/he would receive, what tasks s/he would perform, and how s/he could progress to a supervisory position. The qualification-based system functioned as an implicit contract between workers and employers, stabilising expectations and reinforcing occupational hierarchies.

The category of competence shifts attention to the individuals and their personal resources. It is linked to action, with individual experience taking centre stage (cf. Jurgiel-Aleksander, 2013). This shift is rooted in neoliberal culture, which has transferred the responsibility for people's life success from institutions and organisations, including trade

unions, to individuals. This transition offers flexible forms of employment and differentiated wages but requires individuals to invest time and energy, develop personal strategies, and continuously learn and grow throughout their careers (Nilsson & Nyström, 2013). According to Barros (2012), the concept of competence

> appears to be deeply instrumental and applies overwhelmingly to key benchmark skills that underpin a logic of educational results (meaning productivity gains for companies, and competitive empowerment for employees). (p. 127)

From a critical standpoint, the competency discourse is seen as objectifying education by subordinating it to political and economic goals (Nicoll & Olesen, 2013; Fragoso & Olesen, 2017). Currently, being 'competent' means being a 'well-adapted one, whose personal action is reduced to the sphere of their positive professional commitment and their positive performance as a consumer' (Barros, 2012, p. 130). Following its colonisation of education, the competency discourse extended its reach to domains beyond vocational goals, giving rise to areas like intercultural competences (Leung et al., 2014) and civic competence (Biesta, 2009; Solarczyk-Szwec, 2017; Cramer & Toff, 2017). It has also been employed not only to describe but to design futures (OECD, 2019). In this context, transformative competences have emerged, aspiring to shape the future for better lives. These involve 'creating new value, reconciling tensions and dilemmas, and taking responsibility' (OECD, 2019, p. 4). Transformative competences aim to help individuals navigate various situations and are highly transferable across different spheres of life. Interestingly, this framework stresses learners' engagement with the moral and ethical consequences of their actions. Such competences can be incorporated into curricula and may also 'be acquired at home, in the family, and in the community, during interactions with others' (p. 5). The creation of new value is largely intended to serve 'economic growth and social development that addresses urgent global challenges, such as demographic shifts, resource scarcity and climate change' (p. 5). These competences align with the contemporary neoliberal understanding of civic competences (Solarczyk-Szwec, 2017), yet they also humanise the lifelong learning discourse (Jurgiel-Aleksander & Jagiełło-Rusiłowski, 2013).

Ironically, in contemporary times, a competent citizen is not supposed to be overly engaged in challenging or revealing social injustice. Instead, they are meant to adapt to the existing capitalist reality. In this perspective, the earlier concept of transformability largely pertains to adaptation within a shifting context. Implicitly, however, this adaptation is expected to occur within existing structures, namely liberal democracy and economic growth as the primary socio-political framework. It could be said that the competences discussed earlier are designed to uphold the status quo, or system.

Competence as a potential change

Educators prefer to view competences in a way that extends beyond mere adaptation. They see competences as outcomes of informal learning across diverse contexts (Solarczyk-Szwec, 2017) without reducing those contexts to instruments for achieving specific objectives. In this broad view, competences are dispositions acquired by a person throughout their life through learning (Czerepaniak-Walczak, 1994). These dispositions include knowledge, experience, skills, values, motivation, attitudes and style of action. They become vital in the face of rapidly evolving life conditions and the crises that challenge individuals and societies alike.

This broad approach of competences encompasses not only the skills necessary for the labour market but also the abilities for reflection, critical thinking and identity-building – dispositions that are shaped through social interactions, often independently of formal power relations or hierarchies (cf. Bernstein, 1996; Męczkowska, 2004). From this perspective, competences are seen as resources for individuals and groups, fostering creative social participation and the ability to adapt to evolving circumstances. Bernstein (1996) argues that competences are naturally creative and develop mainly in informal social interactions, independent of hierarchy or power. According to him, while everyone has the potential to acquire competences, not everyone has equal opportunities to realise them, because social circumstances influence who can use them effectively. Bernstein's concept of competences emphasises that demonstrating them requires creativity and adaptability rather than mere passive acquisition of knowledge. For educators, this view is significant as it shifts attention to the dynamic and applied aspects of competences, focusing on their utilisation rather than solely on their delivery through teaching. It stands in contrast to the administrative discourse of competences, which ties their demonstration to employment contexts and frames the challenge as equipping individuals with them for the workplace.

Building on Bernstein's approach, which emphasises creativity and adaptability in the process of realising competences, Męczkowska (2004) extends this perspective to the dispositions of adults engaged in processes of social transformation. According to Męczkowska, the competences not only help individuals adapt to new conditions but also encourage reflection on transforming the social and political environment to freely realise their potential. This raises the question of 'creating the individual potential of individuals and communities for active and creative participation in social life' (Męczkowska, 2004, p. 135) arises.

This perspective on competences shifts the focus from adaptation to actively shaping the conditions of social life, bringing pedagogical discourse closer to a critical reflection on the existing order. This position is sharply opposed to the administrative discourse of competences, which insists on adaptation and subordination to institutional objectives. Thus, education not only equips individuals with skills but also raises awareness of the need for social change – leading us to the concept of wild competences, a proposal that transcends the limitations of this critically reconstructed clash of competence discourses.

Both the understanding of competences as a form of educational oppression and as a driver of potential change assume their instrumentalisation and focus on the individual. This aligns with Biesta's (2009) critique. He notes that the construction of active citizenship, as promoted by the modern competence discourse, leads to its depoliticisation, reducing civic education to forms of socialisation (Biesta, 2009). This limits the democratic potential of individuals, shifting the focus from ongoing processes of democratisation to the notion of democrats as individual attitudes (Bielska, 2014). Biesta argues for a renewed focus on those aspects of education that can break away from the consensual model of democracy, thus addressing a gap in the existing discourse on civic education.

Wild competences and collective action

We introduce the concept of 'wild competences' that are not legitimised by formal education (cf. Weinert et al., 2019). These competences are not purely individual in nature; instead, they facilitate both the creation and obstruction of actions by others, making it difficult to associate them strictly with effectiveness. Wild competences may be individual (acquired by specific individuals), but are primarily collective (acquired by

social groups or communities). They are inherently linked to collective action. It is the emphasis on action that distinguishes the context of social movements from education, whose pinnacle of achievements is the aforementioned critical reflection on the social order. We talk about collective competences because the effectiveness of rebellious collectives depends on how individuals are incorporated into them rather than on how those individuals adapt, since they can withdraw from the movement at any time.

Wild competences consist of specific knowledge, skills and attitudes, which are particularly relevant during times of polycrisis. We conceive of knowledge as inherently critical, action-oriented, and instrumental in addressing urgent crises, serving as the bedrock of social action (e.g., Crowther, 2006). However, it is not merely technical knowledge ready for reproduction in any situation or context. Rather, it is cognitive - processed and constructed through rational engagement. It is also embodied (Butler, 2015; Hirai, 2015) and situated, manifesting in the structures of social movements, the scenography and props used in collective action, and the small-scale architecture of protest camps. This knowledge is not just spoken or written; it is enacted - expressed through rhythmic synchronisation, performative imitation ('fake it till you make it'), and emotional intensity, which fuels collective momentum and identity. Constantly evolving, such knowledge resists articulation through conventional academic discourse. Yet, far from being merely elusive or tacit, it is also inherently risky. Articulating it can expose activists to legal threats, corporate retaliation, or even violence, as seen in struggles against powerful institutions, from environmental defenders in the Amazon rainforest (Domosławski, 2024) to whistleblowers in global labour movements. Thus, while this knowledge is often communicated forcefully to mobilise resistance, it must also be strategically concealed to protect those who carry it. As McDonald (2004) notes, contemporary social movements increasingly rely on embodied knowledge, making it a crucial source of resistance and a foundation for what we term wild competencies.

Skills serve as essential resources for activist individuals and groups. These include organising skills, task delegation, communication abilities, stress management, etc. Within wild competences, such skills are significant as they foster a sense of empowerment and reinforce the belief that change is possible through grassroots collective action (cf. Van Dyke & Dixon, 2013). Activist skills often defy conventional definitions of expertise. Many are developed through direct action and clandestine practices, where authorship is deliberately erased in favour of collective ownership. These skills frequently blend practical and artistic dimensions while operating outside formal recognition frameworks. Some forms of public expression, like street art or eco-art, are practiced in legally ambiguous conditions, where legitimacy is determined not by official qualifications but by the willingness to take risks in a given context (Walter & Earl, 2017). Others are highly specialised, such as shareholder activism, where campaigners conduct corporate-standard analyses and pose strategic questions at general meetings to block harmful investments. Whether informal or highly technical, these skills remain integral to movement strategies, reinforcing collective power in the face of systemic opposition.

The construction of knowledge and the acquisition of skills are central to shaping activist attitudes. For instance, they contribute to sustained engagement in future activism (Van Dyke & Dixon, 2013). At the same time, possessing specific knowledge and skills would be futile without the right activist mindset.

What gives knowledge and skills their transformative potential is the mindset that directs their application. Wild competences prioritise imagination (Castoriadis, 1994; Zielińska et al., 2011), which becomes more vital than knowledge in circumstances demanding radical social and institutional transformation. Radical imagination is the competence in the sense that:

It is the courage and the intelligence to recognize that the world can and should be changed. But the radical imagination is not just about dreaming of different futures. It's about bringing those possible futures 'back' to work on the present, to inspire action and new forms of solidarity today. (Haiven & Khasnabish, 2014, p. 3)

The prominence of imagination emerges in extended, often collective reflections on possible scenarios, typically initiated by 'what if' questions (Ruitenberg, 2008). These competences differ both directionally (e.g., aimed at dismantling and removing obstacles) and morphologically (where radical imagination takes precedence over structured knowledge) from those prevailing in periods when the obviousness of once-established solutions and institutions merely required maintenance and transmission. In a crisis, the competences required to salvage parts of the system or adapt to changes are not the same as those once considered essential for reproducing and sustaining liberal democracy. This difference alone highlights the subversive potential of wild competences. While they bear similarities to the already mentioned concept of 'transformative competences,' their trajectory and associated values differ.

Imagination alone is not enough, it must be oriented by care (e.g., Santos, 2019). While radical imagination enables envisioning any future, care provides its direction, anchoring it in concern for others and the world. This distinction is key in differentiating between movements that aim to change the conditions under which power operates and those that merely seek to replace individuals in positions of authority.

This distinction mirrors broader theoretical debates on power and empowerment. Some movements see power as a zero-sum struggle over control, aligning with Weberian perspectives that focus on seizing influence. Others, drawing from Foucauldian understandings, emphasise the democratisation of decision-making and the creation of participatory structures (cf. Cheater, 2005; Steinklammer, 2012). Wild competences, in this view, do not fit neatly into one ideological category (the left or the right one) but emerge wherever collective agency is cultivated through radical imagination and care, shaping struggles that transcend simple leadership transitions to challenge the very mechanisms of power.

Wild competences are grounded in critical thinking and reflexivity (cf. Brookfield, 2005). They enable individuals and groups to question the conditions under which they live and act, breaking free from the mechanical reproduction of established orders. Their critical capacity is directed at systemic issues. Wild competences find expression in questioning processes of democratisation, which are central to citizenship. In this sense, wild competences extend beyond the social dimension, assuming a political character that 'supports modes of political action and civic learning committed to a more critical and more political form of [...] citizenship' (Biesta, 2009, p. 146). Emerging spontaneously, sometimes in response to conflict, wild competences demonstrate how individuals and groups learn throughout their lives, transitioning from formal education to critical and creative actions within the realm of civic activity.

Examples of social practices that cultivate wild competences include the collective action of activists and activist groups, such as street protests. Collective action occurs when 'a certain number of people unite and act together with a shared purpose. It can take various forms, ranging from short-term, focused efforts to long-term, disruptive activities' (Fernández Torres, 2015, p. 67). In addition to voicing political demands crucial for democratisation, collective action 'may also take the form of the direct production of collective goods, through a broad range of actions that stretch from the communitarian enactment of alternative lifestyles to various forms of mutual help and

service delivery' (della Porta & Diani, 2015, p. 3). Activists' actions and the learning derived from them, take place through engagement in various types of dissent (including resistance to authority), observing the world, reflecting on their actions, and understanding their place within a broader context (e.g., Szczygieł, 2022). Activists are both mobilised and mobilising actors, who, through collective action, not only respond 'in the heat of the moment' to current crises but also demand that authorities take proactive measures to address problems. Focusing on the emergence of competences within collectives, including those perceived as destructive, is valuable for understanding social movement learning because it highlights what can be transferred beyond social movements and their struggles (cf. Choudry & Kapoor, 2010; English & Mayo, 2012).

Wild competences as shaped within social movements can be understood from the perspective of the basis for reflexive action, engagement in the laboratory of emancipation, and the condition for reconstructing the social order.

Wild competences as the basis for reflexive action

This aspect of wild competences is accompanied by the assumption of the inseparability of thought and action, rooted in pragmatism (Dewey, 2009). Within this perspective, intellectual and practical elements are integrated, based on the belief that action is one of the ways of thinking (Męczkowska, 2004). Thinking, in this view, is oriented towards solving specific problems, often of an ethical nature. Here, action in the context of wild competences is not synonymous with the adaptation of social actors to relatively stable external conditions. Instead, it represents a pursuit of change. The shifting context necessitates the reinterpretation of existing conditions, which may lead to innovative forms of activism and, consequently, to the transformation of previously learned ways of thinking and acting. Reflexivity, therefore, forms the basis of the activity of both individual and collective agents. Competence serves to address problems, including cognitive ones, which are practical in nature and arise in changing conditions.

Various activist practices illustrate this point: discussions in General Assemblies (Min, 2015; Monge Lasierra, 2017), internal debates, setting objectives, and coordinating actions through social media (Bendyk, 2020), as well as ensuring the use of appropriate language at protests and effective communication overall (Steinberg, 2014).

A particularly vivid example of wild competences emerging through reflexive collective planning is the five-finger tactic used during the 2007 G8 summit protests. Developed by the BlockG8 alliance and rehearsed in protest camps, the tactic involved splitting a mass of 5,000 people into smaller 'fingers' capable of bypassing police lines through coordinated divergence and re-convergence. As protesters approached a police blockade, 'they split according to pre-established <<fingers>> and this way trickled the police line' (Scholl, 2012, p. 106). The tactical learning was explicit and pedagogical: 'Don't run straight at the cops; aim for the gaps!' (p. 106). Such actions illustrate how reflexivity functions not only in the moment but through prior rehearsal, anticipation of constraints, and embodied spatial intelligence. The resulting disruption, 'colorful lines of protesters [...] with a policeman once in a while looking on rather helplessly' (Scholl, 2012, p. 106), demonstrates that reflexive action in activist contexts is both strategic and aesthetic, learned and performed.

A key component of reflecting on activist actions is engaging in counter-actions (Eyerman, 2006; Kotarbiński, 1965) or prefigurative actions in support of values (Habersang, 2024). Moving from thought to action is a key element of citizenship, understood as 'the active participation of citizens in public life, arising from their own initiative' (Gierszewski, 2017, p. 46). Activists often emphasise the importance of their

actions, strong motivation, and a focus on values and goals, both personal and communal. This is activism mediated by reflection on the state of the world, the community, or representative democracy (Ishkanian & Glasius, 2016). While formal education allows for stepping outside individual interests and adopting a broader perspective – local, communal, and global – social movements often demand quick, even provisional, decisions to draft an 'action points' list and move towards (cf. Bolton, 2017).

Activists communicate their desire to create an alternative reality and improve social and political conditions, both locally and globally. Their tool for achieving these goals is exerting influence on politicians. As Bendyk (2020) notes, 'they draw on this accessible and widespread knowledge, putting politicians in a difficult position by exposing their hypocrisy' (p. 88). Such actions require systems literacy competences - the ability to read, analyse, and critically interpret the conditions in which activists operate to effectively pursue collective goals.

Competence, pragmatic in nature, is not only the foundation of effective action. Action serves as a source of knowledge, forming a continuum of the subjects' experiences (Męczkowska, 2004). The reflexive nature of action supports the reconstruction of both individual and collective experiences, establishing competence as the foundation for understanding oneself and the world. The reflective aspect of wild competence emphasises the relationship of the individual or collective subject with the world (cf. Męczkowska, 2004). This aligns with the concept of socio-cultural learning theories, within asserts

> learning is a natural and indispensable element of an individual's participation in the world of practice. Participation, through engaging in interactions with others, carrying out shared tasks, resolving emerging contradictions, etc., requires continuous negotiation and renegotiation of the world. (Malewski, 2006, p. 45)

Wild competences, when viewed through the lens of reflexive action, emerge as both a source and an outcome of learning processes that reconstruct aggregated and collectively negotiated experiences. Each subject, with their unique experiences, acquires distinctive competences, such as being part of a people's microphone (Steinberg, 2014), which are difficult to standardise and measure. Yet, the outcomes of collective activist efforts remain assessable (Szczygieł, 2022). The knowledge and skills generated by activists are thus reflexive, dynamic, and rooted in practices such as procedures for listening, decision-making, and integrating different perspectives (cf. Jaster & Young, 2019).

Wild competences as engagement in the laboratory of emancipation

Wild competences exhibited by activists reveal the potential for social change of an emancipatory nature. Potentially, emancipation is achievable through communication and is scalable - what works for a small group can inspire societal transformation on a larger scale. Męczkowska (2004) explores the emancipatory aspect of competence, drawing upon Habermas's (1988) social thought. This philosopher critiqued social relations based on objectifying dynamics, which restrict individual freedom. According to Męczkowska, competences serve as resources enabling the negation of the social order, which, ideally paving the way for a democratic society based on communication. Emancipation entails liberating individuals and groups from prior constraints and unfavourable social dependencies, often framed as 'freedom from'. Liberation, even if temporary, manifests both individually and collectively, through the acquisition of awareness about various entanglements (Męczkowska, 2004). Competence is a subjective construct with a

collective nature. Habermas links the micro-social development of individuals to the macro-social development of societies, emphasising the importance of emancipatory communicative action (Męczkowska, 2004). Such communicative emancipation emerges from the development of the competences among active participants (cf. Brookfield, 2010). Habermas (1988) identifies three different types of competence: instrumental (adaptive), communicative, and critical (emancipatory). Wild competences particularly resonate with the latter two, as they are integral to various collective actions of activists.

Communicative competences are utilised in practices 'focused on reaching agreements with others through a jointly constructed system of meanings' (Męczkowska, 2004, p. 147). The literature on activism and collective action is rich with discussions on activists' struggles with communication processes, debates, exchanges of views, and clashing opinions (Steinberg, 2014). These activities often reveal tensions, including: (1) considering the voices and opinions of a diverse group of participants, which highlightes the challenge of opening up to multiple discourses; (2) agreeing on a unified narrative and making provisional decisions about specific actions; and (3) crafting a coherent message that resonates with an audience beyond their activist 'bubble'.

In grappling with these challenges, activists frame their efforts in terms of learning (Foley, 1999; Crowther, 2006). They highlight outcomes such as improving their ability to articulate messages, actively listen, engage in discussions, and recognise shared struggles and demands (Ahmed, 2024). These communication-based learning outcomes seem aimed at fostering consensus when action is required. However, achieving consensus is rarely straightforward.   It clashes with the nature of liberal democracy, which thrives on tensions and contradictions and often resolves disputes by outnumbering the opposition. For activists, dealing with diverse perspectives and inevitable conflicts becomes essential. In a social movement, one cannot simply 'outvote' others without risking their disengagement. Thus, preserving collective unity demands addressing conflicts collaboratively. From a communicative perspective, embracing difference and accepting diversity may play a greater role than reaching consensus within the emancipatory process. This creates a competence for navigating communication under conditions of ongoing disagreement or the perpetual absence of full agreement. From a more radical perspective, it could even be said that activists raise issues rather than ease or resolve conflicts (Carpenter et al., 2024).

Activists in social movements often face communication challenges such as misinformation, internal disagreements, and the need to reach diverse or marginalised audiences. To navigate these difficulties, they develop competences that allow them to translate complex social problems into multimodal, affective, and publicly resonant forms of expression. The Chilean feminist collective *Las Tesis* exemplifies this through their globally echoed performance *Un violador en tu camino*, in which participants chanted the same words in synchrony, embodying a collective voice. By combining choreography, music, and a sharp critique of systemic gender violence, the collective bypassed the constraints of institutional media and created a form of protest that was both accessible and powerful. (Gutierrez Valdez, 2024). Such interventions demand not only artistic and performative skills but also strategic awareness and readiness to face further exposure to repression.

Wild competences among activists are an aspect of critical (or emancipatory) competences, as a dynamic readiness acquired through diverse interactions, of both individuals and collectives. This readiness is expressed in recognising limitations and deprivation, as well as boldly expressing dissent (Czerepaniak-Walczak, 2007; Ahmed, 2024), deciding on ways to overcome them (Min, 2015; Monge Lasierra, 2017), and achieving new realms of freedom and rights. This can be described as consciousness

raising and constructing knowledge of a 'revealing' nature, a topic frequently explored by critical scholars of adult education as one of its core tasks (cf. Brookfield, 2005). Activists in this context mention the ability to distinguish between people, theories, and ideologies; learning about the complexity of social problems; identifying injustices; and practising critical thinking (English & Mayo, 2012; Zhu, 2023). All of these issues are of great importance in the emancipation laboratory of social movements, which requires motivation and commitment to collective effort (Gierszewski, 2017), despite the inherent risks involved (Bendyk, 2020).

Wild competences as a condition for reconstructing the social order

Another aspect of wild competences can be framed within a post-critical approach to education (Hodgson et al., 2018). This perspective moves beyond emancipation understood as freedom 'from' constraints and shifts towards emancipation 'to', emphasising the potential for reconstructing the social order on new foundations.

Competence as a potential for change and reconstruction of the social order expresses itself in the willingness and ability to support individuals and groups, to endorse ideas, beliefs, or actions, and to foster a sense of community that reaches beyond the status quo. It also manifests in grassroots activism focused not only on exposing domination and revealing relations of power, but on taking action driven by a sense of care, duty, and justice. Participation in large mobilisations, like Occupy Wall Street, leaves a lasting imprint on how individuals perceive the world and social relations. As Graeber (2013) notes, those who have once felt the spirit of true democracy become unable to return uncritically to hierarchical structures, recognising them as absurd limitations. These 'veterans' of mobilisation bring the spirit of change with them into institutions they march through - sometimes almost mechanically introducing new practices and raising questions that challenge the status quo. These actions of various scales become 'events' with the potential for novelty and transcendence (Badiou, 2007). The components of such an event, its specific location, and everything it brings together, reside within the activist community. And when, every now and then, something extraordinary is achieved through mobilisation, its very occurrence makes it permanently possible in the future.

In the context of wild competence as a potential for change and reconstruction of the social order, the role of community is pivotal – it offers support, fosters identity, and facilitates learning. Within such a community, people support each other during transformative actions, creating bonds and relationships in the process. They collaborate and learn from each other. Their goal may include voicing the position of their community, making shared values public and living by them.

The content of learning related to this competence includes learning to construct communities, foster citizenship, solidarity, and tolerance through participation in collective actions. It also involves understanding that others can self-organise and act – appreciating their potential rather than their deficiencies. The pre-designed self-organisation of activists highlights the potential of people, especially on a micro-scale, such as within neighbourhoods. This potential is realised during social gatherings, where grassroots initiatives and autonomy are central values (Mansilla López, 2015). Cooperatives have often been referenced in the literature as spaces that shift economic thinking, rooted in the realities of labor. They are not simply opponents of capitalism but sites where autonomy, equality, and solidarity are actively produced (Fragoso & Olesen, 2017). Another significant source of activist competencies is the squatter movement, where individuals develop a range of skills, including breaking and building techniques, organizational strategies, and strategic manipulation. These also include legal knowledge

on defending occupied spaces and a readiness for acts of bravery (Kadir, 2016). The practice of identifying and reclaiming abandoned buildings represents a post-critical response to the overwhelming power of capital in urban areas. Rather than stopping at critique, it transforms disused spaces into sites of resistance and self-determined living.

One critical learning experience tied to building and changing through collective actions is the discovery of creativity. Creativity and the ability to self-organise can lead to concrete actions that re-build a social order of equal citizens (cf. Biesta, 2010). This includes equality in terms of power-sharing within activist groups. Steinberg (2014) writes that: 'Square movements seek to encourage a platform for full participation and the experience of political efficacy, especially among the long disenfranchised, perhaps dissipating the apathy that is the psychological symptom of systematic exclusion' (p. 704).

The potential of horizontal structures welcoming everyone's engagement is evident within post-critical theory, which prioritises the so-called philosophy of responsibility. This philosophy is marked by care, not just for individuals and groups, but for the world as a whole. In this conception, the world is fragile and therefore requires care from all of us – from anyone and everyone, whose turn it is in the relay of generations. Activists, in this light, are characterised by their willingness to inherit the responsibility for the world from previous generations. This is, however, a unique form of responsibility that, firstly, transcends hatred (understood as rejecting parts of the world) and, secondly, emphasises love – identifying what is valuable and worth doing or saving. Activists here are not focused solely on themselves but on the world and the community, guiding others to notice what deserves attention. This perspective applies to many forms of activism. A striking example is climate justice activists, who, despite being aware of the fragility of their achievements (and the ongoing marginalisation), practise an ethic of care for both humans and non-humans impacted directly or indirectly by climate change change (Bond et al., 2020).

Activists' actions revitalise debates, offering alternative modes of governance and decision-making outside the mainstream (neoliberal) framework. Climate justice groups, in particular, reject depoliticisation, instead actively re-politicising their actions (Bond et al., 2020). Thus, their activism, which may initially appear as simply a dissent against policies destructive to the world, is a deliberate and imaginative commitment to take responsibility for the world, paired with a decision to engage in the kind of politics Biesta (2009) described as sorely missing.

While the responsibility and care for the world are not unique to activists and are shared by other political actors, what distinguishes activists' wild competence is their explicit readiness to participate in the repair of the world. At its core, participation in protests represents a declaration of intent to become a resource for efforts that surpass the status quo and strive for positive social change.

Conclusions

The traditional notion of competence – being engaged in public affairs, participating in social and political organisations – versus incompetence, marked by entitlement towards the state and withdrawal to the margins of political, social, and economic life, is no longer relevant when viewed through the lens of wild competences. Wild competences are subversive: they challenge the instrumental logic of the current competency discourse, which prioritises adaptation and efficiency within the framework of the neoliberal order. Instead, they highlight the need for education to recognise how knowledge, skills, and attitudes are generated under pressure, at the edges of formal systems. They point to a

deeper form of resilience, rooted not in individual mastery, but in shared improvisation amid disruption.

Unlike traditional models, wild competences are not subject to certification or standardisation within the formal education system. Their essence lies in the ability to destabilise hierarchies, deconstruct the existing social order, and initiate change through collective, reflexive action. These competences go beyond the individual capacities; their core is imagination and creativity, enabling questioning of the status quo and initiating change through collective engagement and collaboration.

Wild competences, therefore, enable a reversal of the logic of competency identification from a top-down approach (e.g., derived from various documents or curricula) to a spontaneous, grassroots, and organic form emerging through the collective actions of various groups and social movements.

Despite their transformative promise, wild competences are not without limitations. Beyond the obvious challenges of measurement, they often rely on conditions more accessible in the Global North - such as relative freedom of assembly, access to digital infrastructure, and dense activist networks. In contexts marked by repression or limited civic space, the opportunities to develop and apply such competences are severely restricted. Moreover, practices based on wild competences tend to be highly local and difficult to replicate on a broader scale, which limits their impact in addressing global dimensions of the polycrisis. Even within movements, such competences may remain the privilege of a few, vulnerable to co-optation or institutional capture. Finally, activists who initially engage through voice may, over time and due to burnout or systemic failure, shift to exit strategies, withdrawing from sites of struggle and taking their competences with them - thus weakening collective capacity for resistance.

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Promoting learning in the rescue department: A community of practice perspective

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Abstract

The modern digitalised workplace requires continuous learning to maintain the skills and knowledge required for civil protection work. The purpose of this study is to identify the primary factors that enable learning in the rescue department. Data was collected in semi-structured interviews with firefighters and fire officers from a Finnish rescue department. The results of the study show that peer support and learning preference are valued across organisational ranks. Technology has a crucial role as it disrupts workflows and necessitates new work requirements, while serving as a tool in social interactions, learning and knowledge management. The findings contribute to research on workplace learning through the development of communities of practice for civil protection workers, emphasising the need for collaboration and adaptive strategies for learning in the workplace.

Keywords: workplace learning, communities of practice, technology, firefighters

Introduction

The contemporary workplace faces constant changes driven by technological advancements. Organisations adopt various technologies to enhance the productivity and efficiency of their workforce. For example, in the context of the fire departments in Finland, such new technologies include mission management and shift planning software, communications devices and drones. The adoption of new technologies alters the requirements for working and completing tasks. For officers, this means that decision making processes are made within the framework of the software design and its workflows. For firefighters, changes in equipment such as drones require training time,

and careful planning, as they alter operational procedures. New skills, competencies and retraining opportunities are required by the workforce to use new technologies in their work (Shahlaei & Lundh Snis, 2022).

While standardised or institutional education provides a foundation for working, it may not cover the specific learning requirements of different workplaces. The education and pedagogic practices implemented need to suit the work activities and workplace, and should be done through working (Billett, 2021). In order to design learning suitable for the digitalised workplace and the changes that are necessary, both the workers and the organisation need to be considered (Ley, 2020). Employees value social interactions in learning, while the organisation can assist through the provision of learning opportunities and the promotion of autonomous learning (Amenduni et al., 2022).

As a theoretical point of analysis, the social domain in firefighter workplace learning aligns with Lave & Wenger's (1991) concept of communities of practice (CoP). The three fundamental components of CoP are domain, community and practice. Domain embodies the common interest, identity or purpose linking the members. Community refers to the social nature of learning, developing relationships, collaboration and nurturing a common sense of belonging. Practice refers to the shared resources, tools and activities that evolve organically over time (Lave & Wenger, 1991; Wenger, 1998).

Despite significant research on CoPs, little is known about their application in the context of learning in rescue departments. The aim of this study is therefore to identify the primary factors that promote learning in the workplace. Interviews with firefighters and fire officers were conducted to gain insight into learning preferences and current challenges in the design of a rescue department CoP. The following section discusses the concept CoP and its implication for individuals and the organisation. Afterwards, the methodological implementation and the results are presented and discussed.

Communities of practice

Understanding the essence of a CoP involves recognising it as a social structure, where individuals converge around shared expertise, engaging in continuous learning and collaboration (Handley et al., 2006). This shift in focus sheds light on the interconnected nature of workplace dynamics and the significance of collaborative practices within a CoP. For organisations such as the rescue department, CoPs are beneficial as they foster knowledge sharing, collaborative problem solving, professional development and enhance organisational performance (Wenger et al., 2002). Learning occurs both within and across CoPs. Therefore, CoPs present an opportunity for the rescue department workers to learn within their teams, other departments in the organisation, and through external networks. Within CoPs, individuals learn through repetition, gaining legitimacy and achieving mastery. Across CoPs, learning occurs by organising discussions, acknowledging other perspectives and challenging assumptions (Oborn & Dawson, 2010).

The role of the organisation is pivotal in facilitating learning experiences. Workplaces that succeed in promoting learning share some common characteristics: participation in multiple CoPs, providing access to learning opportunities, acknowledgement of the employee as a learner in the workplace, flexibility in working, clear role expectations, continuous support and facilitating the building of relationships (Steinert, 2014).

Within the broader discourse of learning in the workplace, the concept of learning organisations describes the capacity of a company to facilitate learning and transform itself (Senge, 1990). CoPs are an integral part of the learning organisation, representing

social units such as teams, who through learning, peer support and collaboration benefit themselves and the organisation at large. Dedicated CoPs allow teams to converge and interact in groups with either shared interests, expertise, roles or geographical location (Auer et al., 2020). In the rescue department, new applications and hardware present opportunities to promote learning and adoption of technologies through CoPs. This is particularly relevant for technologies that are unknown to the majority of employees. When new challenges emerge, solutions and experience may sit within individuals, and the organisation must find strategies to share knowledge and best practices (Smith Milway & Saxton, 2011).

The implementation of such strategies requires an understanding of the organisation, its resources and capabilities. For the organisation, the provision of support necessitates an understanding of its resources and capacities, and how they can be utilised. The resource-based view (RBV) is a framework used to analyse the organisations' competitiveness through its resources and capacities (Barney, 1991), and has applications in the public sector for strategic resource management (Beck & Storopoli, 2023; Kosiol et al., 2023). The resources of an organisation consist of tangible and intangible assets. Tangible resources are physical and material, while intangible resources include aspects such as knowledge, technology and reputation. RBV research on public organisations includes social capital and job expertise to enhance learning and knowledge management (Pee & Kankanhalli, 2016). The capabilities of an organisation consist of functional work needed to create value, and its ability to dynamically manage competences through learning and social relations (Lubis, 2022). This involves balancing individual needs with organisational engagement, aligning learning opportunities with career goals, development programmes and actual training needs, as well as facilitating the acquisition of essential skills and competencies. Individuals' interests must be openly supported by the workplace through formal and informal learning opportunities (Manuti et al., 2015).

Fostering learning through communities of practice

For the purpose of CoP implementation to improve learning practices, Pyrko et al. (2017) note that workers require problems or challenges they have in common to gather around and connect through. Such shared problems provide the firefighters and fire officers with challenges to engage with the group, have time to think together and mutually engage to sustain the shared practice. In addition, participation and identification with the group can be perceived as valuable and attract further participation (Pyrko et al., 2017). As technologies change working practices, through collaborative learning, the rescue department workers can develop a shared understanding of the work processes and tasks (Bittner & Leimeister, 2014). As the groups grow beyond the initial social or operational circle, the identity of the group and ways of working may change. This provides opportunities to invite novel perspectives, alternative experiences, diversity, and further social connections (Hughes, 2010).

Workers in high-pressure occupations, such as firefighters or healthcare professionals, benefit from a sense of community in the workplace. A positive perception of their workplace community and provision of support are beneficial for reducing stress (Cowman et al., 2004), and workers develop resilience through trust, peer support, effective leadership and wellbeing in the workplace (Conway & Waring, 2021)

While the study and application of CoPs has been limited in civil protection work, they are extensively used in healthcare (Noar et al., 2023; Ramazan et al., 2024). Both healthcare work and rescue services operate in high stress situations requiring preparedness and quick decision making. For both groups, specialised training

programmes are beneficial for stress management, reducing exhaustion and depersonalisation, and to improve coping skills (Vagni et al., 2022). Within healthcare, CoPs contribute to the development of competencies; reducing organisational, professional and geographical barriers; information sharing; reducing professional isolation; and facilitation of new processes and technology (Ranmuthugala et al., 2011). Participants value the opportunity to receive and provide feedback, periodic meetings with an open dialogue, and the opportunity to exchange experiences with participants outside their organisation (Jeffs et al., 2016).

A study by Shaw et al. (2022) notes that numerous and diverse applications of CoP's within healthcare exist. However, the design and implementation of CoPs vary as they are deployed for specific purposes and work areas within healthcare. Various CoP frameworks are used, necessitating careful considerations of the pedagogic design, implementation and quality assurance (Shaw et al., 2022). Therefore, CoP frameworks developed for healthcare cannot be applied to the rescue department context as such. The design of new learning interventions through CoPs requires consideration of the learning and working processes within the rescue department. The barriers to participation identified by Gimenez et al. (2017) provide a foundation for design considerations. The barriers include: unsuitable technologies for interaction, sharing and storing knowledge; no dedicated time within the work schedule; fear of criticism; lack of facilitation; and unclear benefits and procedures within the CoP (Gimenez et al., 2017).

Prior to the implementation of a CoP, factors perceived as beneficial to learning need to be identified. The identification and integration of learning enablers ensures commitment from both employees and the organisation (Wallo et al., 2022). Therefore, the research question is as follows: how can learning be promoted in the rescue department?

Methodology

Interviews and a qualitative analysis were used to collect rich and textured data, allowing the participants to express their thoughts, understandings, perceptions and interpretations (Knott et al., 2022). Qualitative insights are valuable for exploring the experiences and perspectives on learning and how to design a suitable CoP for learning. Officers hold knowledge and carry out administrative and managerial tasks. Firefighters perform rescue operations, maintain operational equipment and train for various emergency scenarios. Four officers and four firefighters were interviewed.

An initial expert interview was held to gain insights into the workplace and the surrounding contexts, to aid formulation of the research approach, and reach potential interview participants (Monke, 2007). After the first contact with the officer participating in the expert interview, snowball sampling was conducted to reach additional interviewees (Naderifar et al., 2017). The study was conducted in Finland, using the English language to communicate between the interviewer and interviewees. Therefore, knowledge of the English language was a criteria for participation in the interview. Prior to the interviews, the research was presented to participants, and consent was collected. The interviews were conducted at the main fire station of the rescue department. The eight interviews were recorded and transcribed, with the data pseudonymised using a random number between 1 and 8. The interview duration ranged from 24 minutes for the shortest, to 56 minutes for the longest, and yielded 20,542 words of data. The interview discussions focused on how learning is organised within the rescue department, the organisational perspective on learning; perceptions on learning processes, strategies, and roles of coworkers in learning; and the influence of technologies on learning.

The research began with a deductive approach to provide the initial structure and theoretical concepts on learning in the workplace, and moved onto inductive coding for immersion into the data to develop themes (see Table 1) (Skjott Linneberg & Korsgaard, 2019). As the aim of the study was to identify how learning can be promoted, the first round of analysis was focused on concepts of CoP, workplace learning, technologies in the workplace and the RBV. The transcripts were read through multiple times during the analysis of the collected data, and ten code categories were developed. The code categories were reviewed, refined and finally merged until a theme was identified.

Table 1. Examples of data analysis

Data sample	Concepts	Code category	Theme
First, I try to do it myself. I try to find some information on the internet or my previous notes and documents. *Someone from our organisation shows me how to use [technology] and I just use it. If something comes up, I ask them what and how to do it, and that way it goes into the workflow.* *I arrange a meeting and we discuss the problem, and everyone can say how they feel and what will be the conclusion or improvement of that problem.* *We encourage discussions among people, about what is happening and what everyone is working on. For example, I have to show interest in what others are doing and support it.*	Perceived sense of community among firefighters (Cowman et al., 2004) Perceived formal support, informal support, wellbeing and trust among firefighters (Conway & Waring, 2021)	Independent problem solving Trust in colleagues to aid in problem solving. Support for problems in the workplace. Support for work and individual development.	Peer support
Usually there are some videos on how to do things, then there is a PDF, which you can follow. In my private life, I have noticed that if I have to learn something, I open YouTube. More independent learning opportunities are good, because then I can learn like, in my own way, and it is written based on my own calendar. *...we have other rescue areas around if the problem is so big that we cannot handle it by ourselves. I can ask rescue chiefs all around Finland, 'How do you solve this kind of problem?' And that is, I think, that is the main way we do it.* *When delivering training to firefighters, we wouldn't need anything to show in person, and we could do it in Teams: there are cameras, and we can see our faces, something like that. But it is best when I go there.*	Formal and informal learning in the workplace (Manuti et al., 2015) Learning methods and contexts in workplace learning (Jacobs & Park, 2009) Learning in CoPs (Steinert, 2014)	Learning resources Learning suitable for the learner Maintaining knowledge through practice Learning preferences	Learning methods
If I am like old, I'm more of the 80s firefighters, and I think a drone is a bad thing. We explain first that this is a drone, this is how it works. This is where it helps.	The changing role of technology in knowledge	Affordances of technology	The role of technology

For example, in a forest fire, you do not have to walk two kilometres to watch the smoke. We can put the drone in the air, it flies, and it looks. It eases up your work and everybody else's work. *There are a lot of good videos [on YouTube] made by firefighters on how to control that burning electric vehicle. I send it to colleagues so they can watch.*	sharing (Pan & Leidner, 2003) Roles, modes of interaction and frameworks for virtual communities of practice (Shaw et al., 2022)	Knowledge sharing	

To ensure the reliability of the data analysis, stakeholder checks with research participants were performed (see Table 2). The first check was performed following the data analysis to verify the interpretation of the data, and the second check when a preliminary version of the paper was drafted (Thomas, 2003).

Table 2. Research approach

Time	Activity
October, 2023	Initial theory and structure written
October, 2023	Expert interview with fire chief
November, 2023	Eight interviews with firefighters and fire officers
January, 2024	Stakeholder check #1: Interview on preliminary analysis
February, 2024	Stakeholder check #2: Interview on preliminary findings

Results

Three main categories emerged from the analysis: 1) peer support, 2) learning preferences, and 3) the role of technology. Two of the themes, *peer support* and *learning preferences,* highlight the social dynamics of learning within the workplace. *Technology* is a core part of the contemporary workplace and an interconnector for individuals and communities. Extracts from the interviews demonstrate the themes and the influence on learning practices in the workplace.

Peer support

A recurrence throughout the interviews was the process of how individuals seek out help. When a problem is perceived as minor, employees attempt to solve it independently and learn from the attempt. One of the interviewees explained:

> If it's some kind of smaller problem, of course I try to handle it myself. I like to do it myself, figure it out myself if I can. (Participant 1, firefighter)

When employees perceive that a failed attempt would have severe consequences, coworkers are consulted. In particular, employees seek out coworkers they know are knowledgeable in the problem domain. The following extract illustrates this:

> If I need to fix or repair something, and I don't know how it's done, I don't want to damage it more from my actions, I'd rather ask for help. I ask, for example, (a colleague with technology competency) or some of my other co-workers. (Participant 4, firefighter)

A common notion was that the working culture in the organisation is built on trust and respect. The workplace fosters an environment of open discussions and helpfulness, inviting members of the working community to seek and provide help, and exchange knowledge and expertise. In this respect, one of the participants stated:

> I arrange meetings and we discuss the problem, and everyone can tell how they feel and what will be the conclusion or improvement of that problem. (Participant 3, officer)

Employees stated that they have a great degree of freedom and control over their work. This was apparent both among the firefighters and fire officers. The employees are trusted to carry out their duties and perform the tasks that are their responsibility without close control from a supervisor. The mention of freedom throughout the interviews was associated with employees having options in terms of how to accomplish their work. In addition, the employees noted that this allowed for flexibility in arranging their work priorities, as one interviewee explained:

> If you have some position in the structure, you know what you have to do. Everything depends on what kind of people we have here. I think that this organisation is good, because there are different breeds of people. Not everybody has to follow these rules too closely if somebody wants to try something new and thinks differently. (Participant 6, officer)

The freedom in work has given the employees agency to explore developments in the civil security domain. The employees identify knowledge gaps and share information with each other. In addition, the employees propose ideas to supervisors, seeking improvement in training and education to adapt with the latest developments in the security domain. One of the participants explained this as follows:

> If I tell my superior that we would like to learn about electric cars, could we check electric cars next month and see how they work. In that case, we do have some possibilities to affect what we are learning. (Participant 1, firefighter)

An officer who moved from a large fire station to a much smaller one compared the two workplaces. In the big cities, specialised departments consist of a large number of employees who are highly specialised in their particular working area. Such units were seen as organisations within the organisation. In the small fire station, individuals are tasked with specialised responsibilities, making the workplace more approachable and connected. The fire department units and areas of responsibility, therefore, do not seem as distant or disconnected from the surrounding units. One of the participants explained this aspect as follows:

> Before I came to this rescue department, I was in a much bigger fire department. There were dedicated departments for different responsibility areas. I think that it was so big that they didn't have as many discussions as we have here. But here, we are so small that we have to have a lot of multi skills. So, we try to continuously discuss things, and that is kind of a natural way to solve problems here. (Participant 7, officer)

The value of learning preferences for acquiring skills and knowledge

When the participants were asked how they learn, the primary difference was between the learning of the firefighters and officers. Training was reported to be more prevalent for the firefighters, as training exercises are scheduled regularly and serve to maintain the readiness of the team for emergencies. Through education, knowledge is disseminated on new technologies, practices and threats in the domain, as the excerpt from the data below illustrates:

> If we think of the year as a clock, we have specific things that we train for at specific times. Then we might have some experts from outside our rescue department to give us lectures, for example, on some [electric] car accidents. We can train for different scenarios with other departments, with people that know the thing better than we do. (Participant 2, firefighter)

Officers do not have planned regular training sessions as part of their work. Dedicated training sessions are held on mission management tasks, while the majority of the learning is aligned with the officers' position and responsibilities. Depending on the person's position and interest, they can choose the learning they require to perform their work, as one of the participants explained:

> Firefighters have to do the scheduled training. But I don't have that kind of training. So, it's like, in my own interest, motivation to find my own training. (Participant 7, officer)

The participants highlighted the significance of learning in an environment where knowledge sharing is motivated by the organisational culture. The participants mentioned having trust in coworkers who are knowledgeable in the domain they teach and appreciated feedback in the learning process, as the following interview extract illustrates:

> If you know the drone, you know how it works. It relieves my stress when I think I know it and I show it to you. And you, for example, are the professional in that field and you give the feedback to me that 'yeah, you know it and you can do it'. (Participant 4, firefighter)

The above example highlighted that employees value the acceptance from experienced co-workers. They gain confidence when their skills can be demonstrated to the teacher and receive constructive criticism. To be able to provide feedback to the learner requires the teacher to have practical experience with the technology as well as explicit knowledge of how it works. One of the participants explained:

> For example, colleagues if they know the thing, if they are experienced and they really know. But if a drone is new to me and to my colleague, I don't feel confident if my colleague says ''yeah, you can go and fly it''. It has to be someone that has done it and knows it and can evaluate my skills and give me feedback. The feedback is the most important thing. (Participant 2, firefighter)

When asked about their preferred learning methods, the participants preferred that the introduction be given by a teacher, regardless of whether the knowledge delivery would be theoretical or practical. Learners want opportunities to learn independently, whether it is in between scheduled learning sessions or after the end of the planned learning. This requires learning materials to be suitable for the learning subject, and to involve video tutorials, texts, or space for practice. In addition, the participants reported valuing learning materials which would allow for more flexibility in scheduling their learning. The fire

station works in four shifts, and it requires adaptation and multiple sessions to ensure all employees have completed the learning. One of the participants explained:

> Most people do things partially. They have to do something else also. So, they don't have a large amount of time to teach people, for example. Those [learning] materials could always be better, so that people are able to study independently. (Participant 5, officer)

When the participants elaborated on teaching and training, the majority of the negative sentiment revolved around financial and time limitations. A limited budget means that often external expertise cannot be hired to deliver teaching to the staff, or participation in paid courses cannot be done. One of the interviewees explained:

> Money is always something we don't have enough of, and time also. And maybe teachers also, we don't have enough teachers. So, the same workers have to compensate for the lack of time and money and teach everybody else. (Participant 8, officer)

The role of technology in teaching, learning and collaboration

Technology adoption has resulted in greater productivity in the workplace. With software decision making is becoming digital, processes are automated and streamlined. The need for fewer employees leads to the concentration of responsibilities and tasks within the remaining workforce. Employees require knowledge specific to their roles, as well as knowledge to perform administrative tasks. One of the participants explained:

> [Technology] is making work faster and faster. If, 20 years ago, you had a position like this [officer], there would be a lot of meetings and secretaries. Sitting in meetings, you make some decisions, and that's it. But nowadays, all the time, you get so many more tasks which you have to finish the same day. There is email, and a lot of different programs which are becoming more complicated all the time. Ten years ago, we had people to help do some things. But now you have to do those things by yourself. (Participant 5, officer)

To acquire knowledge in the civil security domain, workers use technologies to explore the practices of their peers. Knowledge is available in forms of articles, videos and social media. The interviewees connect with their colleagues to learn practices from across the country and abroad. Technology has provided practitioners with access to observe and learn from peers from across the globe. One of the participants explained:

> I see what some other countries do, what it's like in the USA, what it's like in Sweden, what it's like in Norway; that is something where I might find new ideas, new things that I could bring and try in Finland. (Participant 2, firefighter)

Networks are formed where knowledge is exchanged, and individuals ask for advice and opinions on the latest developments in the domain. Although more common among officers as representatives of departments, annual events, such as seminars and conferences allow for learning and the exchange of knowledge among experts. Employees also have alumni networks and acquaintances from joint exercises where connections are established and serve similar purposes. One of the participants explained:

> I have discussions with colleagues from other rescue departments. If something new comes here and I don't know what it is, I might call the colleagues from, let's say Helsinki or Espoo. ''Oh, do you have this? What do you think? Have you used it on missions?'' [Technology] is something that always intrigues us, but does it really work in the mission? Does it bring us anything good? (Participant 1, firefighter)

Thus, the majority of teaching has to be delivered internally, by employees. However, the employees do not always possess the expertise needed to teach on certain topics. The second constraint is time, as their preparation is limited in how many hours they can dedicate to preparation and delivery. The participants highlighted that a broader participation in the selection of technology could be beneficial. Having more employees trial new technologies and exchange opinions would provide more insight into its suitability for the workplace. When purchasing the new technology, experts should be hired to provide the teaching to the first group, ensuring that multiple employees have knowledge which can be disseminated internally. One of the participants explained:

> And when the technology has been bought, and we are trying to use it, at that stage, we should use the money to hire a professional person to teach us how to use it, instead of someone on our own staff who may be not that good at using it or teaching that technology, trying to teach the other individuals. Then no one knows how to use it. That's the stage when the money should be spent and not let it go to the stage when employees say ''we don't want to use it''. (Participant 6, officer)

Discussion

This study aimed to identify factors which could be beneficial to learning in a rescue department. By identifying factors beneficial to learning, a CoP can be designed to support competence development in the organisation. The results highlight the need for peer support, supporting learning preferences, and the role of technology in design considerations for a rescue department CoP.

Peer support in the workplace context is contingent on interpersonal relationships. Workers value trust, honesty, collegiality and communication as determinants of peer support. This result is in line with previous research reporting on the importance of peer to peer support towards positive perceptions of the workplace and the use of CoPs (see Deraney, 2022). Providing help and feedback, discussing errors and trust were mentioned by the participants, all conducive of a supportive learning environment. Similarly, perceptions of support from the supervisor are indicative of having support from the entire organisation. Organisations providing a supportive learning environment and development opportunities are more likely to retain talent (Grohnert et al., 2021; Lehtonen et al., 2022). Support from supervisors and peers are positively correlated with job performance, job satisfaction, and role clarity (Agarwal et al., 2020). Support is required by the organisation in establishing the CoP. Over time however, the leadership and facilitation must be driven by the participants. Such responsibility should not be determined by one's position within the organisational hierarchy. Instead, the potential leader must know how to inspire, provide guidance, validate ideas, foster imagination, exploration and discovery (Serrat, 2017).

The help seeking behaviours present in individual cases could be transferred to group settings. Within the CoP context, help seeking practices would benefit the group in facilitating interactions and deliberations. Rather than disrupting existing processes, these identified preferences for peer support and learning methods could be implemented within the CoP. For the rescue department, the practices include active sharing, the provision of lessons, a knowledge database and the capture of knowledge through reflection, experimentation, and communication (Oktari et al., 2020). As such the rescue department can make use of informal learning opportunities to support its staff. A role dedicated to learning support, such as a mentor, in collaboration with the CoP leadership could aid in identifying challenges and actively support participants to benefit from the

CoP. Such roles within the CoP necessitate training and knowledge to support workers (Viking & Nilsson, 2024) but offer a means to strengthen organisational competencies as well as improve on the understanding of roles and responsibilities (Foglesong et al., 2022).

Learning preferences refer to the varied needs and learning requirements necessitated between individuals, and between firefighters and fire officers. For the firefighters, pre-planned training provides a helpful structure and annual goals. Although the training is focused on each individual, the participants note that learning from experienced members provides a safe space to practice and receive support. Fire officers shared the same notion. Although the officers do not have training exercises, administrative work is individual and role specific, while organisational and national policy meetings allow for social learning and knowledge exchange. This suggests that within mandated learning structures the working community provides valuable support in learning, creates a sense of belonging, generates meaningful social connections, and improves self-confidence (Maccabe & Fonseca, 2021). The social learning process is a desirable addition to necessary learning materials and supplements the methods through which knowledge is represented. Learning materials in the form of videos, presentation and meeting documentation present learning artefacts to reflect on learning and collect knowledge for sharing and preservation. One of the design considerations of the CoP is therefore knowledge management and means of interactions that allow the collection of knowledge and various means of representation.

Considering peer support and learning needs, the technological requirements of the CoP are framed. The diversity of ranks and roles in the rescue department requires systems which are suitable for the collection, storage and classification of information. Therefore, multiple tools may be required to establish and manage groups, in which CoP interactions and learning occurs, external connections are made, and resources and capabilities are developed and monitored. The use of multiple technologies would allow the CoP to adapt and change when necessary to retain members, knowledge and its aims. Prior research confirms the adaptive power of CoPs and their potential in surpassing challenges across organisational boundaries (Garavan et al., 2007) . The need for internal teaching provides opportunities to define adaptive roles within the community, having knowledgeable facilitators through learning exercises and collaborative tasks. The organisation's support for CoP would fortify its validity as an avenue for peer support and learning, as well as a means to further the resources and capabilities of the organisation.

As noted by *participant 8*, an officer, resource constraints limit the capacity of the organisation to prepare teaching materials and deliver the teaching. An employee-driven learning approach could alleviate the resource restrictions while making productive use of the employee's own capacities. RBV research on public organisations shows that top management and the human resources (HR) department are critical in enacting such changes to increase human and social capital (Collins, 2021). HR strategies need to consider employees, their experience, knowledge and how to utilise their potential. The employees, technical infrastructure, processes, working culture, and values of the rescue department provide the fundamental resources, from which an organisational transition begins and is shaped to develop its new learning strategies (Szymaniec-Mlicka, 2014). The CoP provides an opportunity to alleviate resource constraints by moving the responsibility of teaching from officers to the individuals. As an intermediary, the CoP provides individuals with peer support and collaboration, while officers transition from an active teaching role to a mentorship role.

The first limitation of this study is the focus on the Finnish context. It is possible that the inclusion of additional countries in the study would produce different results. The focus on a small subgroup of practitioners does not produce outcomes that are necessarily applicable to other countries. In addition, the use of English may influence the expression of thoughts and their interpretation.

The second limitation is the limited scope of the study. The study examined only firefighters and fire officers, limiting the findings to the rescue services domain. While the outcomes are primarily relevant within the rescue services domain, they may offer valuable insights into the promotion of learning within the context of rescue departments.

Conclusion

The contemporary workplace, driven by technological advancements, is undergoing constant changes necessitating the adoption of various technologies for enhanced productivity. The transformative impact of technology on work tasks mandates continuous learning and the acquisition of new skills by the workforce (Shahlaei & Lundh Snis, 2022). Workplace learning encompassing formal and informal methods is essential for individual development and organisational development, emphasising the need to align learning opportunities with career goals and organisational needs (Jacobs & Park, 2009; Manuti et al., 2015).

This study delves into the workplace learning of firefighters, examining the influences on learning within a framework of communities of practice (CoP). Communities of practice (CoP) serve as social structures, where individuals converge around shared expertise, fostering continuous learning and collaboration (Lave & Wenger, 1991; Wenger, 1998). CoPs within workplaces, whether in-person or virtual, contribute to knowledge sharing, collaborative problem-solving and professional development (Wenger et al., 2002).

The research methodology involved purposive sampling and semi-structured interviews with firefighters and fire officers, exploring learning strategies, the impact of technology on learning, and influences on workplace learning. The analysis identified three main categories: peer support, learning preferences, and technology. Peer support emerged as a vital aspect, emphasising the culture of trust and open discussions within the organisation. Resource constraints, particularly financial and time limitations, contextualised the challenges in learning arrangements. To ensure the reliability and validity of data, stakeholder checks were performed with research participants during data analysis and the draft version of the paper.

Technology adoption played a crucial role in knowledge acquisition within the civil security domain, enabling practitioners to explore global practices and connect with peers for knowledge sharing (Pan & Leidner, 2003).

The study recommends a more inclusive approach to workers' learning practices. It underscores the significance of carefully assessing workplace dynamics and requirements before introducing new technologies and needs for learning. Workplace dynamics can be assessed through the organisation's employee engagement strategies, such as practices for communication, recognition, and growth of employees. In addition, by examining the work culture in the organisation, the dominant values, norms, and social engagement can be observed. Employee engagement strategies and working culture both influence job satisfaction (Khan et al., 2024). CoP design should therefore include opportunities for workers to improve their self-efficacy, strengthen relationships and build their collective identity (González-Anta et al., 2023). Trust and commitment by members and the

organisation are fundamental in both the design and implementation processes. Members require facilitation and a stimulating environment to engage (Shaw et al., 2022).

Further research on CoPs for the rescue department is needed to understand the practical implications of how to motivate workers to join, continue participating, and manage knowledge within the CoP. Enabling workers to learn through work promotes the working environment as a learning practice (Billett, 2023), highlighting the potential of CoPs to help overcome resource constraints and fostering workplace learning.

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Struggles of highly educated adult immigrants as identity negotiations through Finnish language learning

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Abstract

This article aims to advance a critical understanding of language learning and identity negotiations among adult immigrants. Through Bonny Norton's (2013) theoretical lens of 'identity as a site of struggle', we argue that immigrants often find themselves in contradictory positions assigned through unequal power relations because of their inadequacy in using the local language. Using narrative positioning analysis, we explore the ways in which highly educated adult immigrants in Finland negotiate their identities through Finnish language learning. Our data consists of initial interviews from a longitudinal study with seven adult immigrants who participated in Finnish Integration Training. Our findings show how the acts of identity negotiations referred to three specific types of 'struggles': struggle for recognition of competence; resistance against immigrant stereotypes; and the balancing act of parenthood in a multilingual context. These negotiations highlight difficulties and inequalities adult immigrants face, but also their empowerment through language learning.

Keywords: identity negotiation, adult immigrants, language learning, narrative analysis, positioning

Introduction

The purpose of this article is to analyse how adult immigrants negotiate their identity through language learning. Identity negotiations are interpreted through the lens of 'identity as a site of struggle' used by Bonny Norton (2013). Adult immigrants often find themselves in contradictory positions assigned through unequal power relations by discourses related to migration and language. Some such discourses subjectify migrants based on their apparent inadequacy in using the local language as they simultaneously present a sense of national linguistic homogeneity or coherence (c.f. Archakis & Tsakona, 2022). They can also project contradictory ideals of proactive and independent yet compliant migrants, especially regarding linguistic integration. Learning the local language becomes then a process of reconciliation and negotiation of these contradictory positions to find empowerment (Norton, 2013; Norton Peirce, 1995).

Identity research concerning language learning is important to dispel some of the long-standing and unwarranted myths about the difficulty of learning a language as an adult (cf. Ausubel, 1964). Like Norton and other linguistic scholars, we argue that the deeper processes of identity negotiation and their power relations offer a better explanation of why learning a language as an adult immigrant is difficult (Cervatiuc, 2009; Norton, 2013; Norton Peirce, 1995; Peirce, 1994; Reeves, 2009). In research and practice, highly educated adult migrants are often overlooked by homogenising views of the social group 'migrant' (cf. Kurki, 2018; Nordmark & Colliander, 2023). We believe that research focused on this particular group will enrich our understanding of the many intersecting aspects that can accompany the category of 'migrant'.

In the Finnish context, there is a lack of research regarding identity negotiations related to Finnish language learning, especially from the perspective of highly educated migrants and their everyday interactions. Finland has only relatively recently experienced larger immigration flows, and research in this area has focused on other aspects of language learning and integration. For example, teachers' skills to support immigrants' language learning (Kärkkäinen, 2017) or the language learning strategies of immigrants (Naif & Saad, 2017). Much of the existing identity research opts for a larger view of identity so it has mostly focused on larger life stories and significant turning points and not on everyday interactions (e.g., Olakivi, 2013; Pöyhönen et al., 2013; Pöyhönen & Tarnanen, 2015; Tarnanen et al., 2015). In this article, we reiterate that, in line with Norton's findings, negotiations of identity can also occur in these small interactions (Norton Peirce, 1995; Peirce, 1994). Such situated identity negotiations have been researched through narrative methodologies (c.f. Bamberg & Georgakopoulou, 2008; Georgakopoulou, 2006).

To better understand how highly educated immigrants negotiate their identities through language learning, in daily interactions, we ask the following questions:

- What kinds of contradictory identity positions are related to adult immigrants' Finnish language learning?
- How are highly educated adult immigrants positioning their 'selves' in their narratives of everyday interactions (small stories)?

To answer these questions, we analyse narrations of everyday interactions and other small stories (Bamberg, 2006a, 2006b) shared by seven highly educated adult immigrants in Finland. These narrations arose in interviews about the early stages of their Finnish language learning in integration training in Turku, Finland. Using narrative positioning,

we have explored their struggles to reconcile contradictory positions related to the migration discourse in these reflections. Although these positions are all related to language learning, they extend beyond it to become negotiations of identities.

Identity, selves, and language

In studies on language learning the concepts of 'identity' and 'self' are often used in parallel to address conceptions of who we are. Norton refers to identity as 'how a person understands his or her relationship to the world, how that relationship is constructed across time and space, and how the person understands possibilities for the future' (Norton, 2013, p. 45). In her understanding, identity is not reduced nor bound by contextual boundaries but the term is usually constricted by categorisation (e.g., social identity, linguistic identity, ethnic identity) (c.f. Thesen, 1997). To address the complexities of defining contextualised identity without reducing it to any single category we have chosen to use the term 'self' or rather 'selves'. Selves refers to conceptions of who and how we are in specific contexts, while identity refers to Norton's theoretical understandings.

The use of the concept of 'selves' also allows for a more detailed understanding of context-situated identity our research requires, by highlighting the reflexive nature of narratives. In the narratives about one's life, the narrator and the central figure in the narrative are the same (Bruner, 1987). The narrator is an object to her/himself. This view is congruent with the tradition of symbolic interactionism where the 'self' is understood as divided into two parts: 'I' representing the active side of the self, and 'me' the evaluative side (Mead, 1934; Blumer, 1969). Both sides of the self are present in the ways one describes and evaluates oneself in language. It can be expressed in terms of what and how the self (I/me) is (Harter & Fischer, 1999, p. 3) in a given context.

As van Lier (2010) explains, it is through the self that we act in certain ways in certain settings seamlessly interchanging as we move from one context to another. As a driver of our actions, the context-situated self also guides our use of languages in interactions through socially acquired communicative rules. From this perspective, language becomes more than signs and symbols used to communicate. Language is history, culture, rules, values, and social cues. It is the vehicle of communication of discourses and how we socialise, learn and become who we are (Norton & Morgan, 2013; Norton Peirce, 1995). More importantly, for adult immigrants language is power. It can be exerted through different forms of control, such as linguistic integration, and it can be used to become who we want to be in a new society (Cervatiuc, 2009). It is essential to remember that neither selves nor language are static. They are in constant redefinition through one another, especially in interaction. As Weedon (1991) explains, in language and interactions we can redefine the meanings of words but also the meanings of self.

This dialogic redefinition of selves in interaction is best described through the use of positions. Norton uses a similar approach to investigate how migrant women in the United States and Canada struggled to claim the right to speak English. She found that the women in her study found empowerment and legitimacy in work settings through familial, social, and religious positions (Norton, 2013; Norton Peirce, 1995). Positions, according to Harré and van Langenhove (2003), refer to collected 'moral' and personal attributes and expectations. They limit what and how we can speak, and if we should be heard or not. Positions may emerge naturally in interactions, but in some cases, dominant speakers may force their interlocutors, even unconsciously, into specific positions. In turn, the interlocutors may accept, negotiate or reject this positioning and reposition themselves and the other speaker. Harré and van Langenhove (2003) describe this process

as a 'complex weaving together of the positions (and the cultural/social/political meanings that are attached to those positions) that are available within any number of discourses' (p. 49).

It is this weaving of positions that can become, for adult migrants, what Norton refers to as 'identity as a site of struggle' (Norton, 2013; Norton Peirce, 1995). Adult migrants struggle through positions they assume, and positions assigned to them by power relations in interactions. In their struggle, they find positions from which they can be recognised as legitimate language users and members of society. It is important to note that positions, and their behavioural norms, are informed by larger social and political discourses we are exposed to daily, and are negotiated in terms of our relations to others. Therefore, the sociocultural and political contexts in which adult immigrants learn the local language are key to understand from where contradictory positions emerge.

Migration and linguistic integration in Europe

Most European countries have quite diverse populations and migration flows due to many political and economic alliances. This seemingly natural diversity of Europe is further advanced by policy-driven advocacy for multilingualism and reciprocal language learning amongst nation-states (Council of Europe, 2014). Although many European countries have experienced migration in many forms and for centuries, the social, economic and linguistic integration of migrants continue to be regarded as topical issues. In most cases, learning the local language is assumed to promote the social and economic integration of migrants. It is under this guise, that many European countries have developed policies and programs dedicated to the linguistic education or integration of migrants (Rocca et al., 2019).

The terminology used in these policies and practices, and even in research on this topic, are not without issue. To begin with, the term 'migrant' carries with it heavy economic and political inequalities. It makes a clear division between the 'local' and the 'other' implying 'preferential social, economic and political rights' for the former (Lucassen & Lucassen, 2015, p. 15). The term has also been used as a socially constructed, dynamic and unequal way to categorise people, what Tuuli Kurki (2018) calls 'immigrantisation' (p. 63). It perpetuates the separation between the 'majority population' and 'immigrants' and implies that the responsibility of integration falls on the immigrants alone.

The use of the 'migrant' and 'immigrant' (as anyone coming into a country) in this article is done with full awareness of these power inequalities. They are part of the lived experiences of the participants whose stories we interpret. They are also the basis of our interpretations of their identity struggles to make themselves equal to their local peers and to stand out as model (non)citizens in everyday linguistic interactions.

Learning Finnish as an adult immigrant

Finland is a country that has only relatively recently experienced larger immigration flows. At the end of the 1970s, Finland's net immigration was still negative. The amount of people born abroad has increased in Finland only after the mid-1990s. While the share of persons with foreign background in Finland was 0.8% in 1990, the corresponding figures were 2.2% in 2000 and 8.0% in 2020 (Statistics Finland, 2021). As a result of the

rapid increase of the immigrant population, Finland has developed integration policies and practices to answer to the needs of its newly diverse population.

As explained by Kurki (2018) integration training in Finland in the 1970s was offered mainly to refugees and focused mostly on language training. Working life guidance was added in the 1990s through existing programs for unemployed Finns. In the early 2000s, integration training was extended from refugees and asylum seekers to include all other immigrants as a response to labour market needs. Later in the 2010s, Finland shifted the responsibility of integration training from the public sector to private companies. Through procurement procedures, private education institutions and centres would present their integration training plans and curricula to the Center for Immigrant Integration (ELY-keskus). They evaluated and selected the training providers based on price first and quality second (Kurki, 2018, pp. 7-17).

As in many other countries, immigrants in Finland have particular difficulties in finding their place in the labour market. In 2021, the unemployment rate among immigrants was 18.0%, while it was only 9.4% among those born in Finland (Statistics Finland, 2023). As of 2021, adult immigrants in Finland were still offered integration training through private institutions. To be eligible one must have lived in Finland for less than three years, be at least 17 years old, and be or recently become unemployed (some exceptions apply). The stated aim of integration training is: 'for the student to reach working basic proficiency in Finnish or Swedish […] needed for functioning in everyday life, Finnish society, work life and further studies' (Finnish National Agency for Education, 2012, p. 24).

Each integration training provider can develop their own integration training curriculum or adapt the National Curriculum of the Finnish Agency for Education to regional needs and opportunities. In their curricula, most training providers include Finnish language instruction[1], Finnish culture lessons, workplace internships, and vocational training guidance.

Finnish integration training programs and curricula present the learner (adult migrant), their motivations, goals, and previous knowledge as the centre and starting point for integration training. Nevertheless, their implementation often perpetuates the broad homogeneous categorisation of migrants who should be responsible for their own integration (Kurki, 2018). Integration training also tends to guide adult immigrants into paths that turn them, as fast as possible, into workers fitting the demands of the local labour market (Levine & Mallows, 2021). This usually disregards their previous knowledge, skills, and interests, effectively socialising them into becoming certain types of socially acceptable citizens (Colliander & Nordmark, 2023).

Local context: Turku, Finland 2021-2023

The city of Turku, Finland is the fifth biggest city in the country, with a total population of around 200,000 inhabitants. It is a port city with a history as the country's previous capital city and the cultural capital of Europe in 2011. In terms of language, the city is mostly Finnish-speaking. However, due to its proximity to the sea and strong ties to Sweden, Swedish is also part of the linguistic landscape. The diverse population of the city of Turku includes also temporary students from its many universities. Some of them may stay in the city as job seekers or employees after completing their studies. At first glance, the community in the city of Turku is international and inviting. The share of foreign citizens is greater in Turku (8.2%) than in Finland on average (5.8%) (StatFin database, 2024) and navigating everyday life can be done through English or basic levels

of Finnish. However, as we will discuss in this article, the realities of living as adult immigrants in Turku can be full of struggle.

During the years 2021-2023, seven adult immigrants living in the city of Turku contributed their immigration and language learning experiences for the study 'Why Am I Learning Finnish?'. The study explores their processes of identity negotiation through language learning. In introductory and follow-up interviews approximately one year apart, participants shared their views on current language teaching practices, immigration experiences and lives before moving to Finland. They also shared stories of their attempts to use Finnish with locals and foreigners. Visible in these narrated interactions are examples of positioning struggles which we have interpreted as negotiations of selves. The research project, which this study is a part of, adheres to the ethical guidelines of the Finnish National Board of Research Integrity (TENK) and has been approved in 2021 by the Ethics Committee for Human Sciences of the University of Turku.

Methods

In the field of narrative research, there are several ways to approach identity. In this study, we use the 'small story approach', in which narratives are understood as performances of a situated identity (c.f. Bamberg, 1997; Bamberg & Georgakopoulou, 2008). The analytical focus is on how people present themselves and negotiate their social position through narrative interactions. Our aim in using such narrative positioning analysis (Bamberg, 1997; Siivonen et al., 2023), is to explore the context-situated ways in which highly educated adult immigrants in Finland negotiate their identities through Finnish language learning.

Our data consists of introductory interviews from a longitudinal study with seven highly educated adult immigrants who participated in Finnish Integration Training between 2020 and 2023. The first author conducted the interviews in English and Spanish. The first interviews took place in late 2021 and 2022. They lasted from 40 to 60 minutes and were transcribed verbatim, simultaneously pseudonymising any personal or identifiable information. The data consists of 154 pages of transcribed text. The first author translated the quotes used in this article from interviews done in Spanish using a mix of literal and sociocultural translations. This method gives a more accurate English version of what participants expressed. The selection of the quotes is explained in more detail in the analysis section.

The interview schedule for the first round of interviews was formulated around the background of the participants. The interviews included their educational, professional, and personal journeys in their previous countries of residence. It also included their experiences of migration to Finland and their first encounters with the Finnish language. The interview questions were formulated openly, leaving space for the interviewees to reflect upon the continuity and change they may have perceived in themselves. Table 1 below provides their general background, although names and more specific details have been changed or omitted to protect their privacy.

Table 1. Participants of the study

Pseudonym	Age bracket	Region of previous residency	Highest education level (area of studies)	Number of languages (including Finnish)	Interview language
Karim	30-39	Asia	Postgraduate (Social Sciences)	Multiple, not specified	English
Lidia	40-49	Europe	Undergraduate	4	English
Marta	40-49	Latin America	Undergraduate (Psychology)	3	Spanish
Ana	40-49	Latin America	Undergraduate (Education)	3	Spanish
Laura	30-39	Latin America	Undergraduate (Business)	2	Spanish
Juan	30-39	Latin America	Teaching certification (Arts) Undergraduate (Engineering, not finished)	2	Spanish
Lucia	30-39	Latin America	Undergraduate (Tourism)	3	Spanish

We interviewed 5 women and 2 men, whose ages ranged from 30 to 50 years old (see Table 1). The interviewees arrived in Finland between 3 months to 2 years before the first interview. They had been participating in Finnish language integration courses for 3 months to 1 year. The courses were arranged in person or online depending on COVID-19 restrictions at that time. At the time of the first interview, two participants attended their second course in an institution different from their first language course. One participant had attended private lessons before their first course, and one had attended a course for retail workers (in Finnish) before being transferred to integration training[2]. The remaining three participants were enrolled in their first language course.

Analysis: Complementing thematic and narrative positioning analysis

The first author started the analysis by familiarising with the interview data, reading through transcripts, and identifying initial codes using a grammatical approach (Miller, 2014). This method entails identifying statements which use subject-predicate elements, I/me or the more general one or you. It also includes statements in which the subject could be deduced from the immediate context (Miller, 2014). We then sorted the initial codes into tentative themes which related the self (I/me) to Finnish language learning. Afterwards, we refined the initial themes according to their coherence with the idea of

identity struggles. Mainly the struggles between positions of 'subject of' (I) and 'subject to' (me) used by Weedon (1991). We labelled these themes: competence, immigrant-ness (Kurki, 2018), and parenthood.

After the thematic reading of data, the first author identified 'small stories' from the interview accounts. Small stories refer to short fragments of the interview speech, like incomplete narratives, descriptions and fragments about the past, present and future (Siivonen et al., 2023; Bamberg & Georgakopoulou, 2008). They are produced in particular social contexts and can be defined as fleeting interactions. They are often considered to be about seemingly inconsequential incidents and wider social surroundings (Bamberg, 2006a, 2006b; Bamberg & Georgakopoulou, 2008). Their thorough analysis highlights undetected aspects of negotiations of selves (Bamberg & Georgakopoulu, 2008; Georgakopoulu, 2006).

The initial coding using subject predicates, and their thematic grouping into subject positions, served as the foundation for our more detailed positioning analysis. Narrative positioning analysis focuses on how the interviewees narrates these small stories. It pays attention to how they position themselves and others at different levels: as characters in the narrated story; as narrators and audiences (like the interviewer or the imagined audience), and as part or counterparts of 'master narratives'. Master narratives include the personal and socioculturally created discourses which inform our actions (Bamberg, 1997, 2004; Bamberg & Georgakopoulou, 2008). An important analytical question in narrative positioning is: what is the narrator trying to accomplish by sharing the story (Bamberg, 1997)?

We contextualise participants' positioning struggles against social discourses of migration (master narrative) which minimise individuals to their migrant status (cf. Kurki, 2018) and measure migrants against imagined nationalistic standards (cf. Archakis & Tsakona, 2022). These discourses intersect with many aspects of their identity, including language learning. They create an array of positions participants can assume, be assigned or negotiate in their narrations. We interpreted participants' uses and changes between positions and subject predicates (I/me, one, you) as markers of negotiations of identity. In what follows, we share some of the interviewees' small stories about their identity struggles related to Finnish language learning. We selected the stories in which the positioning struggle most clearly represented negotiations of identity. In this way, we present the personal struggle of one participant in relation to the common thematic struggle of all participants.

Results

Identity negotiations of the adult immigrants who participated in this study can be described by referring to the specific 'struggles' related to their Finnish language learning as highly educated migrants. First, they associated the requirement of learning Finnish with the theme of recognition of their qualifications and capabilities, as highly educated with professional careers before their move to Finland. Second, Finnish language learning was associated with their immigrant status and comparisons between the immigrant self, other immigrants, and local Finns were another common theme. Third, the identity negotiations through language learning extended to family relations as participants navigate parenting and role modelling in a multilingual environment in the third common theme. For clarity, we are presenting each theme separately. In reality, these struggles to position oneself are all connected and often overlapping.

Struggle for recognition of competence

All participants in this study had attended tertiary education in their home countries, and most of them have years of work experience. Additionally, most participants spoke two more languages besides Finnish. They could position themselves as multilingual, highly educated and competent professionals in their respective fields. Since their immigration to Finland was not for professional reasons, participants did not have employment secured upon arrival. They soon realised that learning Finnish is a prerequisite for finding a job. More importantly, it is a requirement for being recognised as competent professionals.

Highly educated illiterate

> The dilemma is that I am an educated person. I have flown here in a plane to here and just in one- in one night, I became illiterate, so I cannot work anywhere, any office. No office will accept me, then the choice is skilled labour. (Karim)

Karim holds a master's degree and speaks multiple languages. The struggle to find a graduate-level job without Finnish language proficiency forces adult immigrants to rethink their career expectations ('then the choice is skilled labour'). It puts into question their identity as highly educated professionals. Especially at the start of their integration training, participants struggle to negotiate their professional identities with their understanding of who they are in this new situation. In the short story above, Karim narrates his struggle between his position as highly educated ('I am an educated person') and the contradictory position of illiterate assigned to him because of his lack of Finnish language skills. The position of illiterate ('I became illiterate') can be interpreted not only as being unable to use the Finnish language but also as having all previous education and work experience invalidated, overnight. In his struggle Karim still reaffirms his position as highly educated, implying that the issue of (in)competence does not lie with him, but with those who will not accept him as a professional and competent worker ('no office will accept me'). Even if he was a competent, highly educated professional in his previous country of residence, Karim is redefined in the Finnish language-speaking context as illiterate and unskilled.

    The following small story further exemplifies the struggle beyond the labour-related recognition of the self as a highly educated professional. The Finnish language learning itself re-enforces a sense of incompetence for participants, as they struggle against aspects of their Finnish learning which position them as 'illiterate' regardless of their multilingual capabilities.

(In)competent multilingual

> I mean, at the beginning you don't know and you go even happily ((fake laugh))[3] yes I- minä olen ((translation: I am)) {Ana} and then you realise that they teach you things that even the teacher tells you, yes that is very good but you don't use it. (Ana)

In Ana's story of an interaction with a teacher, she struggles to position herself as a competent language learner and user. Ana speaks Spanish fluently and uses two other languages to an understandable level. When she attempts to perform in Finnish as an experienced multilingual, she is invalidated by her teacher. This is based, not on Ana's use of grammar or vocabulary, but on the fact that she is not using the abbreviated version associated with colloquial speech. Ana's and other participants' utterances in Finnish are not evaluated based on their overall understandability but on their status as non-fluent

speakers. This status is directly associated with their status as migrants. In this way, the discourse of migration restricts participants' position as competent users by constantly comparing them against an imaginary 'native' national fluency with unwritten linguistic nuances (Archakis & Tsakona, 2022).

Interestingly, all participants actively resisted the position of incompetent Finnish users during the interviews. They all incorporated Finnish words, explained grammatical rules and pointed out the differences between the formal and colloquial uses of the language to the interviewer. This metalinguistic awareness reflects the participants' struggle as multilingual and increasingly competent users while still being positioned as incompetent.

Enduring learner

> Or sometimes I tell my {partner}, oh how do you call this thing and I say it in Finnish, because I forgot in Spanish, and eh there are things like- or sometimes with the {child} like- since {they} respond to everything in Finnish, well it sticks to me too, or sometimes I am with- {latinx} and they ask me something and I jo kyllä ((translation: yes, yes;)), si, si ((translation: yes, yes)). (Laura)

In this narration, Laura is a competent Finnish speaker but not always by choice. Forgetting words in Spanish, or Finnish words sticking to her from conversations with her child are not Laura's own efforts to practise Finnish ('I forgot in Spanish / it sticks to me'). Laura's story demonstrates how unavoidable the position of language learner and its supposed lack of competence is for adult immigrants. Laura uses Spanish with her family and friends. Regardless, the Finnish language permeates these interactions, as exemplified in the quote above, leading her to endure constant learning and practising, even on her time off from studying Finnish.

Although the position of learner may be temporary, it triggers identity negotiations for participants in this context because of intense exposure. Even if they had experienced language learning as adults, most of them had not done so as migrants. The struggle stems from the contradiction between feeling like enduring learners in constant 'incompetence' and their own standards of independent communicative competence expected of highly educated multilingual adults.

Struggle as the immigrant 'other'

As participants develop competence in the Finnish language, they also struggle to position themselves against the discourse of immigrant-ness as developed by Kurki (2018). This form of migration discourse implies that the local majority views migrants as a homogeneous group of 'others'; different from the locals, but not necessarily different from each other. Participants' struggle shows their loss of individuality in favour of the 'otherness' of being an immigrant in Finland. But it also reveals that they may unconsciously perpetuate it on to their migrant peers in the hopes of being recognised as exemplary migrants.

Exemplary immigrant

> Juan: it's something I was chatting with my {partner} about and it bothers me a little that a lot of people come here and abuse the system, like in comparison with people who come, you are a good example. You have studies and keep on studying, you are taking advantage

of it, but for good. And I, for example, I when I was in the other school, I saw a lot of foreign people that arrived to do this ((crosses arms)) not interested at all.

Interviewer: I will sit here and they will pay me for sitting here.

Juan: Exactly

In this story, Juan struggles to negotiate several positions: first, against the dichotomy between good and bad immigrants; and second, against a discourse that merges his individuality with the amalgam 'migrant'. Juan positions himself at a distance from other immigrants, including his peers by sympathising with the sentiment of annoyance ('it bothers me a little') towards passive immigrants. Throughout his interview, Juan positions himself as hard-working, explaining how his proactiveness has earned him personal and professional success. Consequently, Juan interprets the passivity of his immigrant peers as 'abusing the system', not earning their opportunities. He ratifies this by positioning himself and the interviewer as 'good' examples, who 'takes advantage' for 'good' by actively studying and learning the Finnish language. The contribution from the interviewer is a preliminary interpretation of Juan's expression 'abuse the system' and his use of body language which is later ratified by Juan himself ('they will pay me to sit here'). We do not see this as a leading comment, but we acknowledge that it perpetuates the view of passivity as 'abusing the system'.

In this positioning struggle, Juan is part of the immigrantisation (cf. Kurki, 2018) process as 'subject to' and as 'subject of' it (Weedon, 1991). He is a subject to this migrant discourse because of his residency status in Finland and his experience of dominant immigrant categorisation. He is also a subject of immigrantisation because he perpetuates it, unintentionally. He positions passive migrants as a homogeneous group collectively 'abusing the system' from which he wants to disassociate. All participants made similar references to trying to perform as 'good' proactive immigrants, carrying a similar implicit exclusiveness which separates other migrants as opposites.

Proper language learners

Go figure that my classmates ((laugh)) I mean, every time that they teach something I am the one who's like, and why like this? Why do you say this? Why did you add l? and why? I mean, I do look at the details and my classmates don't. Sometimes I say, well- or they say any questions? And they start joking because they call me {nickname}, oh {nickname} has a question ((laugh)). (Marta)

Marta is multilingual, has a higher education degree and defines herself as a diligent learner. Like Juan, Marta also struggles to position herself as an active and thorough learner. As she compares herself to her peers, she positions herself as a student who participates and pays attention in class. This affirms her position as highly educated with certain expectations of how a good learner should behave. Marta sets herself apart, as Juan does, by positioning her classmates as collectively not attending to details ('I do look at the details and my classmates don't'). Since they do not perform according to Marta's expectations of active learner behaviour, they are positioned as her opposite: passive and disinterested learners. This dynamic with her peers turns into a recurring joke in the classroom, and Marta is recognised by her peers as the active learner she seeks to portray.

Since all participants were enrolled in language courses at the time of the interview, most described or positioned their selves as active or actively integrating. However, performing as an active learner is not always so straightforward. Karim's contribution

below shows us how immigrant-ness and passivity, including that perpetuated by Juan and Marta, overlooks other struggles immigrants may be facing.

> So people like me, they sit in class for 6 months, one year, then they listen noise. And after, what {government agency} do, they put you in the toughest class, for six months, until graduation, then they bring you down to the other level, then they bring you down to the other level, and then to the basic level. (Karim)

Before this narrated small story, Karim explained he believes that if a person cannot understand a language, the language becomes only noise. He ('people like me') is not able to participate in his Finnish language classroom because he cannot decode the 'noise' due to his lack of Finnish language skills. Karim's story can serve as an example of a mispositioned passive learner by the expectations associated with motivated, active, and experienced learners. In this story, the government agency, an almost omnipotent character, positions people to specific courses ('they put you in the toughest class') and by default into specific positions in these courses. Karim and most other participants were assigned to a fast-track, intensive language course most likely based on their ability to learn, previous education, and linguistic skills (Finnish National Agency for Education, 2012, 2022). What he expresses in this quote shows the struggle to demonstrate the expected behaviour of an active immigrant and a highly educated individual. Instead of participating in class or progressing rapidly, he sits and listens. These are the behaviours that peers like Juan and Marta, may interpret as a lack of interest and demotivation or 'bad' immigrant behaviour.

As explained before, migrants are almost always considered as lesser others (Lucassen & Lucassen, 2015) and as solely responsible for their integration (Kurki, 2018). This sets certain expectations about how migrants should integrate and perform in integration training. The background of participants as highly educated sets the standard even higher. Consequently, behaviours outside the expected, like passivity and silence, are interpreted in a much more critical way, even by peers.

Struggle as parents in a multilingual context

Changes in family dynamics accompany the participants' move to Finland and integration processes. Participants face their own integration, changes, and learning and that of their family members, especially their children. Participants struggle to reconcile contradictory positions related to parenthood that are created as they learn Finnish alongside their children.

Lagging learner

> {they} had to go from learning Swedish to learning Finnish. But children learn amazingly fast. This is the age thing again. By Chris- so {they} went in and all that and by Christmas {they were} able to simply communicate. By the end of the first year, {they were} close to fluent and after two years you would never know there was a difference. (Lidia)

Lidia is fluent in Swedish and is part of a multilingual family of four. When they first moved to Finland, they lived in a predominantly Swedish-speaking area. Linguistic integration for Lidia was not an issue until they moved to a predominantly Finnish-speaking. She experienced, for the first time, constant exposure to a new language alongside her family. Unsurprisingly, she often compared her learning progress to her

children's, and other younger learners, during the interview ('the age thing again'). In the small story above, she implicitly compares her children as learning Finnish faster than she is ('children learn amazingly fast'). She is left lagging as a language learner but also as a migrant parent. In this role, she is expected to educate her children and to be a model of integration. Try as she may, her children surpass her own knowledge and abilities in Finnish. She then becomes unable to guide their education in a Finnish context.

Most other participants also perceived their age as a factor affecting their learning, often comparing themselves as slower or worse learners than younger peers. For participants with children, this setback attributed to age, also contests their position as more knowledgeable in the parent-child relationship. While surpassing the abilities of parents may be seen as a natural development in any family as children grow older, the process is highly accelerated for migrants. It may create power and dependency shifts, especially with underaged children (cf. Norton Peirce, 1995). Participants experience that 'the age thing' challenges their capabilities as learners and as parents; roles in which they should be, by experience alone, more advanced.

Articulate parent

> Yes, yes, my children right now I am like joking like, hey, very soon- you and I won't be able to communicate, you don't speak Spanish anymore, you are speaking only Finnish
> Yeah right, stop, not true ((imitating children)).
> But obviously I am saying it joking because they do speak Spanish. (Juan)

Juan and his family, including his Finnish spouse, used mostly Spanish to communicate before moving to Finland. In this narrated small story, Juan positions himself as a protector of this first language which used to be shared ('you don't speak Spanish anymore'). He is forced into this position because, like in Lidia's story, Juan's school-aged children are progressing much faster in their Finnish language than he is. This creates communication barriers, but only for him ('you and I won't be able to communicate') not between the siblings or the other parent. Even if he mentions twice that the interaction is a joke, the struggle is visible throughout the interview and past his light-hearted manner. He mentioned the issue several times and stressed how much he wants to preserve his language and its cultural practices with his family.

Lucia experiences similar struggles caused by the language progress gap. In her case, it expands from maintaining communication to preserving authority.

> But my {child} also doesn't want to speak to me in Finnish, sometimes I scold {them} and {they} start speaking in Finnish, so that I don't understand. And I say, hey, what are you saying?
> No, nothing mama ((laugh)).
> But yes, I do understand, {they} teaches me some things when {they} feel like it. (Lucia)

In this small story, Lucia struggles to reaffirm her position of authority because the language learning gap is more than a communication barrier. Finnish is becoming a tool for the children to undermine her authority ('I scold {them}' / '{they} speak Finnish' / 'so that I don't understand'), a secret language they can use against Lucia. Like Juan, she shares this interaction in a light-hearted way, but the struggle is visible and complex. Lucia's children were both born in Finland. This means that, even if the language used at home is Spanish, their main language everywhere else has been Finnish. Lucia struggles to catch up with their natural language development in an environment which is not natural to her. In Lucia's story, the shifting dynamics in the family also demonstrate how

parents can become dependent on the children for their own Finnish language learning ('{they} teaches me some things when {they} feel like it').

Migrant parents are faced with the challenge of learning a language which may ultimately create a communicative and emotional gap between them and their children. It may also lead to their losing authority over underaged children, especially if they become dependent on their more advanced language skills.

Present parent

> And they told me, no, we'll accommodate you in a course, I think you could go to an intensive course. And I said, I don't want to go to an intensive course because I have children, I can't study all day. (Marta)

In this small story with government officials as 'they', Marta negotiates her position as a good mother, present in her children's lives. Marta negotiates being a mother as a role model by seeking to learn the local language, and being a present mother who spends most of her time caring for her children ('I have children, I can't study all day').

The position of parent, specifically of mother, which Norton (2013; also in Norton Peirce, 1995) found to be empowering for migrant women in Canada, seems to become a point of contention for the participants in this study. They struggle to reconcile the expectations associated with the role, particularly between being role models and being educators for their children or other family members. Even participants without children expressed a struggle to present themselves as a 'role model of success' for their family abroad while experiencing being an excluded minority in Finland.

Discussion

In this article we have explored how narrated small stories related to Finnish language learning represent negotiations of identity for highly educated immigrants. We have categorised these negotiations into three themes: competence, immigrant-ness, and parenthood in a migratory context. We have interpreted them in the hopes of answering: what kinds of contradictory identity positions are related to adult immigrants' Finnish language learning? and how are they positioning the 'self' in their small stories?

Concerning competence, we have found that participants struggle to reconcile their competent highly educated professional and multilingual selves against the disregard of their qualifications and experiences which is based on their Finnish language skills. Karim expresses the stark comparison between being highly educated and becoming illiterate, which showcases a negotiation of self that surpasses educational qualifications (cf. Ndomo, 2020). The illiterate position also neglects participants' multilingual abilities. Trough constant exposure to the Finnish language, they find themselves as enduring language learners and forced multilinguals, which produces a cycle of incompetence in both Finnish and their more dominant languages as they are slowly forgotten. Participants' positions as Finnish language users are restricted or even denied, not because of their skills, but because their legitimacy as users is negated (cf. Ahlgren & Rydell, 2020).

As highly educated, participants have created expectations about their selves in terms of knowledge and learning. These are at odds with how they are able to perform and advance in their Finnish language learning. It makes them evaluate themselves as incapable based on interactions with the dominant fluent Finnish speakers (Harré & van Langenhove, 2003). Despite the difficulties, participants develop and display their

Finnish linguistic competence. They continuously struggle to reposition themselves as legitimate speakers, seeking empowerment in being able to understand their surroundings better.

Around the theme of immigrant-ness, we have found that participants struggle to position themselves as individuals against the broad categorisation of 'migrant other' (immigrantisation; Kurki, 2018). Participants create for themselves the position of good immigrants against a discourse of migration that views them as collectively lacking (Lucassen & Lucassen, 2015). From this position, they present themselves as active, motivated and independent (non)citizens (cf. Nordmark & Colliander, 2023). Unfortunately, in their quest to stand out, participants must position others around them as different, something to be compared to. This effectively reproduces the idea of others, particularly the less active migrants, as collectively 'bad' in comparison to the projected 'good immigrant' self. In this negotiation, participants redefine their idea of who they are, and reclaim their individuality from the collective 'migrant'. But, if they are unable to perform as is expected of a 'good immigrant' they may not be recognised as individuals and may find themselves again in the immigrantisation cycle.

In their theme of parenting in a migratory context, we have found that language plays a significant role in the shifting familial dynamics. Participants' positions as educators and authority figures are contradicted by their children's faster progress in language learning. As adults underperform as language learners, the children may become educators, helping their parents learn. The children may also turn the Finnish language into a 'secret language' which excludes and undermines their parents. As role models of integration, participants also struggle to continue their language learning, at the cost of quality time spent with their children. As both parents and children progress unevenly in their learning, participants also assume the role of preserver of their first shared language. As they negotiate their selves as parents, participants have to reconcile their ideals of parenthood with shifting familial dynamics and modelling a linguistic practice which may cause a communicative and emotional divide with their children (see Armstrong, 2013, for similar familial dynamics regarding heritage language learning).

These findings, and our interpretations, bring to light some ways in which highly educated adult immigrants negotiate their identities through Finnish language learning even in small interactions. In line with Norton's (2013) 'identity as a site of struggle', some positioning struggles our participants experience have empowered them beyond the constraints of the sociocultural discourses of migration mentioned. However, this empowerment often comes at great personal cost. Additionally, their own empowerment can result in perpetuating cycles of immigrantisation of others. In the end, these findings further demonstrate that migrants are not the passive homogeneous and unchanging group they are made to be in relation to discourses of migration and language learning.

Notes

[1]   Even though Swedish is an official language in Finland and is an option in integration training in the national curriculum, most of the population in the country uses Finnish as a primary language. This applies to the city of Turku, where the research project is being carried out which means that adult immigrants are encouraged to learn that language.

[2]   This participant was originally not offered language integration training because their residency in Finland extended the 3-year requirement.

[3]   The transcript conventions used in this article are adapted from ten Have (2011):
{Anonymised/pseudonymised content} and ((Transcriber's descriptions/notes))

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The self-positioning strategies of adult learners in relation to family narratives

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Abstract

The aim of this study was to identify how young adults position themselves in relation to family stories for better understanding the dynamics of continuity and discontinuity in the process of becoming adults. The qualitative research was conducted in Poland. Author's family narrative sheet was used for data collection. A total of 54 participants aged 19 to 25 were enrolled. Three types of family narratives were recalled by participants, which correspond to the levels in the ecological systems model by Robyn Fivush and Natalie Merrill. Four strategies of self-positioning towards them were identified: construction, co-construction, negotiation, and rejection. The results could be used to support families in deepening relationships through encouraging storytelling. On the other hand, they could help in avoiding idealisation of family storytelling and the recognition of young adults' freedom to re-position themselves towards family stories, myths and legends in order to build their own ideas, values, identities.

Keywords: adult learning, narrative-based learning, family narrative, intergenerational transmission, storytelling

Introduction

People live in a 'narrative-saturated world' (Clark, 2010, p. 4), and the family is the natural environment in which a child learns and creates their first stories. The family is an important community that organises and interprets the experiences gained both by its individual members and as a whole (i.e., the family system). After all, every family has its own story and numerous memories that are recounted through daily and occasional interactions. Intergenerational transmission is possible through family storytelling. Kristin Langellier and Eric Peterson (2006, p. 100) argue that 'storytelling is one way of

doing family', which means that storytelling not only helps to make sense of experiences, but also to build family ties and relationships, unify a family, and define the sense of identity of its members. Storytelling in the family can foster an overall sense of family satisfaction, nurture feelings of closeness, and increase adaptability, providing guidance on how to cope with one's life in a family and beyond it (Koenig Kellas, 2005; Zaman & Fivush, 2011).

Family stories help to teach about the roots and the past of one's family and to understand the surrounding world and oneself in this world, while playing a significant role in making decisions about the future of oneself and one's family. Therefore, they become part of autobiography. The presence of family stories in family life has an impact on the well-being of family members (Sherman, 1990; Koenig Kellas, 2005), building relationships, maintaining family ties and the sense of shaping a community (Koenig Kellas, 2005, 2012), (re)constructing a sense of identity (Cierpka, 2013; Fivush & Merrill, 2016; Nowak-Dziemianowicz, 2016), and coping with difficult situations (Koenig Kellas, 2005; Koenig Kellas & Trees, 2006; Zaman & Fivush, 2011). According to previous research (Budziszewska, 2015; Drężek & Dryll, 2021), narrative texts have a greater persuasive function than descriptive and argumentative texts. Therefore, family narratives play a significant role in upbringing, instructing, and (re)constructing the identities of family members (Zaman & Fivush, 2011; Nowak-Dziemianowicz, 2013; Budziszewska, 2015; Merrill, Booker & Fivush, 2019). Family systems are characterised by homeostasis, the essence of which is family members applying mechanisms that allow for maintaining the stability, continuity, and predictability of the family. This can be achieved through the transmission of family narratives, confirming past and given narratives. However, at the same time, families are morphogenetic, focused on change and development over time. Family members create new stories, but they also position themselves in relation to those narratives that have been, or are, transmitted to them. As a result, they question facts and values, re-edit the stories and make certain decisions regarding further transmission to the next generation. Young adults who are just entering adulthood play an important role in this respect. To some extent, the further intergenerational transmission of family narratives depends on them. Some of them will start families of their own. However, the dynamically changing conditions in which they and their families live, as well as their self-development, self-concept, and attitudes towards the past and the future may have an impact on the likelihood of further transmission of family narratives. Part of becoming an adult is re-positioning oneself in relation to received stories. This process is referred to as adult learning. Family stories become learning.

Family narratives

Robyn Fivush & Natalie Merrill (2016) developed the ecological systems model of family narratives. It refers to the assumptions of the theory of ecological systems by Urie Bronfenbrenner (1979), according to which human development takes place in a series of interconnected environmental systems that interact with each other and at the same time dynamically affect human development with an individual's active involvement. Fivush & Merrill (2016) also refer to the concept of 'narrative ecologies' (McLean, 2016; McLean & Breen, 2016), maintaining that narrative identity development is a collaborative construction between the individual and the stories they have had contact with. The ecological systems model of family narratives consists of three systems: micro-system, exo-system, and macro-system (Fivush & Merrill, 2016). At their centre is the individual autobiographical memory. The narratives that make up these systems interact dynamically with each other.

The micro-system, closest to the centre, consists of 'shared family narratives' (Fivush & Merrill, 2016, p. 307). These are stories about events in which members of the immediate family took part. They were thus all involved in an event that became their shared experience and they talk about it together, although each from their own perspective. As the authors write, 'shared family narratives are both directly experienced and narrated by the family' (Fivush & Merrill, 2016, p. 307).

The exo-system, in turn, creates narratives about events in which not all family members were involved, but they tell each other about them. Therefore, they are stories about experiences gained by the narrator and not by the listener. These narratives are called 'communicative family narratives' (Fivush & Merrill, 2016, p. 310) and are about experiences gained by one family member but not by others. A significant type of narrative in the exo-system are intergenerational narratives. They play an important role as they allow the transmission of values between generations, and constitute a reference point for understanding reality and one's own experiences in a wider context. They can provide specific lessons on how to live and what is important in life.

Family narratives are embedded in culture, religion and history, and thus in a variety of cultural texts, myths, legends, religious parables, etc. They constitute the last of the distinguished ecological family narratives systems: the macro-system. It includes stories about family history, stories about ancestors which often take the form of a family myth passed down from generation to generation, embedded in a certain cultural framework which the narrators often refer to. Apart from these, the macro-system consists of master narratives, cultural myths, and cultural history present in the media, literature, education, etc. They contain universal content, often passed on from generation to generation. As noted by Fivush & Merrill (2016, p. 312), 'these stories are told, but we know little about how individuals incorporate these cultural and family history narratives into their own frameworks for developing personal narrative identity as members of families, communities and culture'.

The ecological systems model of family narratives provides a theoretical framework to help understand how different types of narrative are shared by family members with each other and how they help people to get to know themselves from early childhood. However, every time a story is told, there are variations. The differences in telling, who the storyteller is, who are the recipient is, and the relationship between them all have consequences on the reception of the story. Narratives are constructed for a specific recipient, often for a specific purpose, and represent the way in which reality is interpreted by their creator. Families also have their secrets, untold and taboo stories, lies, myths, and legends. Some of them are accessible to all family members, while others are shared only with selected family members. Thus, the knowledge about oneself acquired by the recipient is not objective. Stories build more or less true and credible knowledge about family, their members and themselves. On the other hand, they build misleading (oppressive, harmful, partial, exaggerated, or idealised) knowledge. Furthermore, each recipient interprets the narrative independently. Sharing experiences with others gives room for (re)interpretation, searching for and giving sense and meanings in the context of changing circumstances and acquiring new experiences. In turn, the stories of other people about life experiences inscribed in their biographies constitute a certain framework for (re)construction and (re)interpretation of one's own experiences as well. A similar role can be played by cultural narratives existing within the symbolic universe and assimilated in the process of inculturation (Dryll, 2004). All storytelling involves learning.

Adult narrative-based learning

According to many renowned scientists (MacIntyre, 1984; Bruner, 1990; Ricoeur, 1992), 'life is seen as meaningful, but the meaning is implicit and can become explicit in narratives' (Mazzoli Smith, 2021, p. 109). Stories help us understand ourselves, other people and the world, as well as the relationships between them. The process of storytelling holds instructional potential for both the teller and the listener. The ecology of living and learning concept highlights the interconnections between living and learning, where living is understood as 'complex interactions with others, and otherness, and with diverse processes, systems and encounters with the physical as well as virtual world' (Bainbridge, Formenti & West, 2021, p. 3). Actively constructing and (re)interpreting personal experiences by creating one's own stories and responding to the stories received is the essence of learning, as emphasised by numerous theories of adult learning. Narrative-based learning theories assume that the narratives created by humans are not a faithful reflection of the past, but a reminiscence of what and how was remembered, and they contain an interpretation of past events from the perspective of the present. They are also subject to the processes of renegotiation and reconstruction (Alheit, 2015) based on (self-)reflection (Alheit, 2015; Ostrouch-Kamińska, 2021). Therefore, narratives are 'conceived of interpretively' (Mazzoli Smith, 2021, p. 109). Narrative-based learning theories explore how individuals endow experience with meaning. Furthermore, the narratives that people create are subject to transformations throughout their lives, influenced by experiences, available narratives, and changing narrative competences. Narrativity can go some way to understanding and explaining why people respond differently to the same circumstances, as it enables various ways of responding to the same social conditions, which is related to the process of interpreting events, processes, experiences and the ability to transform one's current way of understanding (Goodson & Gill, 2011). Experiences that are new or difficult (sometimes even crisis-related) but also epiphanies seem to be particularly 'promising' for adult learning. Adult learning happens when a person realises that they are part of a larger system and they are also not satisfied with how it works but do not know what to do (Formenti, 2024). Adult life then requires change and, at the same time, a new narrative. According to Jack Mezirow's (2000) theory, transformative learning occurs, which involves alienation from earlier established conceptions of self, values and one's actions, and the reframing of new perspectives. It can be understood as 'a continuous effort to negotiate contested meanings' (Mezirow, 2000, p. 3).

A person also positions themselves in relation to the narratives that are told to them. Family narratives can be considered particularly important in this context, because they concern people close to them, but they are also a kind of shared family heritage: they contain memories of family roots, the life stories of close and distant ancestors, sometimes taking the form of family myths or legends transmitted from generation to generation. Positioning oneself in relation to family narratives can be unconscious and changeable over time in the life cycle. Family narratives can therefore be treated as an 'object' in relation to which a person adopts certain positioning strategies related to learning. However, there is a lack of knowledge about how young adults position themselves in relation to family narratives. Within this context, the aim of this study was to identify how young adults position themselves in relation to family stories for better understanding the dynamics of continuity and discontinuity in the process of becoming an adult. A further aim was also to identify the relationship between the types of family narratives from the ecological systems model of family narratives and adult learners'

strategies to position themselves towards them. The following research questions were asked:

- What family stories have people in early adulthood remembered as being often told in their families? What are they about?
- How do young adults demonstrate their own positioning towards family narratives?
- Is there a relationship between the types of family narratives from three levels of family narratives (as theorised by Fivush and Merrill) and the strategies of positioning towards them? How is this related to adult learning?

Methodology

Method and procedure

Assuming that all social situations are a domain of meanings and the social world is the result of interpretation processes (Nowak-Dziemianowicz, 2013), the study was based on the qualitative approach, in the interpretive paradigm. The qualitative research made it possible to learn about the family stories of the study participants and their interpretations, meanings, and strategies for positioning themselves in relation to these stories. This corresponded to the aims of the study and research questions. The data were collected using a proprietary tool: a family narrative sheet consisting of three parts. The first included a set of questions about sociodemographic data (age, gender, education, place of residence, marital status, family of origin, siblings). The second part included a request to recall a family story using a triggering prompt: 'I am interested in the stories that young people remember about their families, as often told in their families. Could you write a family story that is often told in your family? It can be a story about things that you have experienced yourself, or a story about things that you have not experienced yourself but was told to you by your relatives. Please, write this story providing as many details as possible that you can remember.' The third and final part of the family narrative sheet included open questions about the reasons why the participant chose this particular story, the circumstances under which they received this story, their attitude towards this story, what it means to them and how they position towards it. The family narrative sheet was available online.

Participants were recruited from among students of various fields of study (both social and exact sciences) at two universities in Poland. They were informed about the possibility of participating in the study by the researcher and other academic teachers working at these universities via e-mail invitation. The study was conducted according to the Helsinki Declaration. In particular, before starting the research, the potential participants were clearly informed about the objectives and the data collection procedure, as well as the planned publication of the results. The researchers provided their own contact details to participants. Each participant was assured of the confidentiality and anonymity of the research, as well as the possibility of withdrawing from participation in the research for any reason or at any time they felt uncomfortable with their participation in the study. Potential participants had the chance to familiarise themselves with the family narrative sheet before deciding to participate in the study. All participants gave their informed consent to take part in the research. Participation in the research was voluntary and took place in the participants' free time.

Participants

All research participants declared Polish nationality. The selection of the sample was purposeful. Fifty-four people (26 males and 28 females) aged 19 to 27 (M=23) participated in the study. All of them were students of various fields of study in the social and exact sciences. The research group was diverse in terms of the place of residence: 32 lived in large cities, six in medium-sized cities, seven in small towns, and nine in rural areas . The vast majority of study participants came from a complete family (N=47), while the rest were brought up by one parent. Forty-five had siblings and the remaining subjects were only children. The largest number of participants (N=23) had one sister or brother. Five participants were married, while the rest were single.

Data analysis

The material collected in the study was analysed using the thematic analysis method proposed by Virginia Braun and Victoria Clarke (2022). The six phases of the analysis covered: (1) familiarisation with the data by reading and re-reading the data and noting down initial ideas, (2) generating initial codes, (3) searching for themes by collating codes into thematic groups, (4) reviewing themes, (5) defining and naming main themes, (6) writing the report (Braun & Clarke, 2022). First, the content of the family narratives was subjected to thematic analysis. After coding all family narratives, I searched for common themes and sub-themes, taking into account the assumptions of the ecological systems model of family narratives (Fivush & Merrill, 2016). In this way, all the family narratives were divided into three groups corresponding to the three levels of the model. Then, the statements of the participants in the third part of the narrative family sheet were analysed. Finally, seven main themes and 29 subthemes were formulated. After completing the thematic analysis, I conducted a cross-analysis of the results of the thematic analysis of family stories and the statements of the study participants regarding their positioning towards the stories. The cross-analysis allowed me to identify the relationship between the types of family stories and the strategies of positioning towards them of the respondents.

Results

The content of family narratives recalled by young adults

The family stories written by the participants were analysed. As a result of the thematic analysis of the family narratives, three themes were formulated: family history, my loved ones in the family, me in the family. In this way, all the recalled family narratives were divided into three types, which corresponds to the levels distinguished by Fivush and Merrill (2016). The division of all family narratives into three types was necessary due to the aims of the study. Findings are shown in Table 1.

Table 1. Themes and subthemes in family narratives

Theme	Subtheme	Number of family narratives
Me in the family	Me and my family's adventure My achievement in the childhood Me in a difficult situation Me in the everyday life of the family	11 (women: 7; men: 4)
My loved ones in the family	Adventures of grandparents' youth Adventures of parents' youth Parents meeting and falling in love Beginning of parents' marriage Childhood antics of siblings or cousins	24 (women: 13; men: 11)
Family history	History of starting a family (great-grandparents' (unhappy) love stories) Family history in the context of World War II Family history in the context of martial law in Poland in 1981-1983	19 (women: 8; men: 11)

The theme 'Me in the family' comprises narratives in which the author is also a participant. In these stories, the narrators recalled events from their biography that they remembered or that came from their early childhood and were told them by their relatives. Family stories forming the theme 'Me in the family' belong to the micro-system in the ecological systems model of family narratives (Fivush & Merrill, 2016).

The next theme, 'My loved ones in the family', was specific to the narratives about events in which the respondent did not participate but knew from stories. Most of them took place before the participants of the research were born (adventures of the grandparents' and parents' youth, the circumstances in which the parents met or/and fell in love, adventures from the beginning of the parents' marriage).These are thus intergenerational narratives. This theme was present in the majority of the analysed family narratives. The stories in this theme belong to the exo-system model theorised by Fivush and Merrill (2016).

The last theme 'Family history' concerned old times that are the subject of family memories and intergenerational transmission. It concerned the history of the founding of the family (e.g., love stories) or life experiences of family members shown against the background of historical and political events in Poland (e.g., experiences of a great-grandmother or great-grandfather related to deportation to Siberia, resettlement from eastern to western territories, coping during the war, or the captivity of relatives in a prison or concentration camp). Some of the recalled stories were family myths and legends. The stories included in this theme belong to the macro-system in the considered model.

Young adults' strategies to position themselves in relation to family narratives

After the analysis of family narratives, the next step of analysis focused on young adults' positioning towards the stories. As a result of thematic analysis, four main themes were formulated: construction, co-construction, negotiation, and rejection. These themes also name strategies of position towards the family narratives. Findings are summarised in Table 2.

Table 2. Themes and subthemes in explored statements

Theme	Subtheme
construction	story based on own memories of events study participant as the only member of family who take part in the events study participant is the first author of the story narrator is also a character of the story authenticity as obvious readiness to intergenerational transmission
co-construction	involvement in co-constructing stories recalling the story 'after' someone else acceptance acknowledgement of the (historical) facts the message contained in the story as a value in itself unquestioning the authenticity of the mentioned events announcement to intergenerational transmission
negotiation	questioning the credibility of certain content in a story readiness to intergenerational transmission with the announcement revealing one's own attitude comparing the present with the past as a background for negotiating
rejection	questioning the credibility of the story questioning the advice given in the story

The theme of 'construction' refers to the independent construction of a family narrative based on one's own memories of past events in which the storyteller participated. This strategy to position in relation to family narratives is related to those stories in which the research participant was the only member of the family to take part in the events. This person is the first author of the story. The narrator is also the hero of the story, presenting past events as they remember and understand them. One of the study participants emphasised that only she knows what happened and other family members accept her version of events – they create their own versions of the story based on what she told them ('I was alone in the parents' office. No one saw it. I told them this story. I became a family hero. Now we often mention it during family gatherings.' [W43_21][1]). The story is so significant to the entire family that it is treated as a 'family narrative'.

The theme 'co-construction' concerns the strategy of positioning towards family stories, which consists in active engagement in the co-construction of a story referring to events in which the young adult did not participate or participated but does not remember because they took place in his/her early childhood. The young adult recalls the story 'after' someone else. This is why it is not just 'construction'. One creates their own version of it, taking into account its earlier versions by other storytellers. A characteristic feature of this strategy is taking for granted the content of the story and the message/values contained in it. The message contained in the story is considered a value in itself. The study participants expressed the belief that the story contained a deep message resulting from life wisdom, a warning against something or an encouragement to do something. The strategy of co-construction implies that these family narratives describe undeniable (historical) facts. Mentioned events took place in difficult circumstances (e.g., World War II, martial law in Poland, a cholera epidemic, a health crisis in the family, or separation of family members). Aware of these circumstances, some narrators referred to the actions taken by their ancestors and relatives, describing them as heroic, amazing, risky, and fascinating. On the other hand, they described the reality in which the events took place as sad, difficult and unpredictable. Past experiences sometimes influenced a relative's entire life (e.g., 'he was in Auschwitz. (...)

later he made a fortune, but until the end of his life he hid bread around the house in case there was a shortage of food.' [W48_23]). The contrast between the (harsh) reality and the (heroic) deeds of family members puts one's family in a good light. The narrator does not have to fear a negative assessment. One can boast of such a story. The context of the story (a reference to difficult times) makes the narrative even more beautiful and at the same time meaningful to the narrator as a member of that family. The participants who adopt this strategy do not question the authenticity of the events of the family stories (e.g., 'it is uncoloured and tells about authentic events [M12_26], Despite serious memory problems (caused by dementia), my grandfather remembered the entire Siberian experience in details.' [M13_24]). Some of them gave evidence of the authenticity of the events that were recalled (e.g., 'Part of the china was unearthed by my grandfather a few years ago and most interestingly most of it was in good condition. (...) I witnessed my grandfather unearthing these things, which only confirmed the authenticity this story.' [W17_26]). This approach to authenticity may result from the fact that these stories refer to events set in the past, often having a historical background. It is difficult for young adults to question 'big' events set in a historical reality (e.g., during a war). Unquestioning the truth of facts, and absorbing the values contained in the story, enhance the likelihood that the story/legend/myth will be transmitted to the next generations, as announced by some participants (e.g., 'I will tell my children this story someday.' [W51_20]). Some participants, aware of the passing of time and the inevitable passing of an older generation, deliberately evoked stories of the old days so that they would not disappear with their grandparents (e.g., 'I asked grandparents to tell such stories a lot. I thought this way the stories would not "die"'. [M23_24]). Sometimes the request for a story did not result from one's own curiosity, but was initiated by someone else. For example:

> I got to know this story when we were making a family tree at school and we had to tell a family story. I had to tell it, so I remembered it well. At the same time my parents were also making a family tree and travelling around the family parishes and cemeteries, so I asked about different stories. [W40_22]

Some of participants emphasised that their great-grandparents and grandparents liked to remember the old times – grandmothers more often talked about school, family, their love stories, and grandfathers more often about the war. They listened the stories and wanted to remember them for themselves and for others. Presently, they are ready to retell the story as intergenerational transmission, if there is a necessity or request to recall the story. At the same time, they do not rule out the possibility that the narrative may still change and be revised. So, this strategy has to do with continuation of family bonds and continuity in the process of becoming an adult. Young adults looked for certain connections with autobiography in the stories of old times. For example, one participant said that a certain accidental coincidence reported in a narrative determined that she would be born:

> If it were not for these events, neither would my grandmother nor me would have been born. If my great-great-grandfather did not go abroad, if his whole family had not died and if he had not married for the second time, he would not have had two more children. [W1_23]

Three participants told the story of their family settling in the western part of Poland, which in the long run determined where they would live. For example:

> The story begins in 1942, when my grandfather was three years old. (...) The family gathered their belongings and went to the train station. (...) The journey took a long time.

> In the areas abandoned by the Germans, men would occasionally check the nearby farms. One day, my great-grandfather decided that the family would get off at a given station. That's how they settled in the areas where I was born and raised. [M31_24]

The theme 'negotiation' concerns a strategy to position in relation to a family narrative. It consists in adapting the content and credibility of the story as well as the adequacy of its message to contemporary realities. The participant seems to approach the story with some caution or scepticism. Participants who negotiate the family narrative can question the truth of the story, and in some cases the stories are questioned by other family members as well (e.g., 'I am a dog lover, so maybe there is a grain of truth in this story.' [W35_27]; 'My brother is a dentist and he has always questioned the credibility of this story.' [M4_26]; 'This story will always remind me of my grandfather and as if it is his special trait.' [M4_26]). At the same time, some authors seem to 'colour' the events told by their relatives (e.g., 'they did it to make the story funnier'). The participants who position in this way do not deny the value of family narrative, so it is possible that they will be prepared to retell the story as intergenerational transmission, to some extent. However, they announce that they will present their own attitude and opinion about the story. Some participants expressed the belief that the message contained in the story was not relevant to current times and the problems experienced by young people today. They explained that it is good to know the experiences of family members. At the same time, they are convinced that not all past experiences and the life lessons resulting from them are relevant to the problems of today's young generation and do not provide them with advice on how to live. Times have changed and require the development of new, different strategies of action (e.g. '(...) it was then quite tight with money at home. (…) people tried to take care of everything and not destroy it. Quite different than nowadays. Now I can easily replace something with a new one.' [W12_26]).

The theme 'rejection' concerns the strategy which consists in expressing reluctance towards the story. Rejecting the family narrative is the result of completely questioning its credibility. For example:

> (…) his friend broke a tooth and, unable to make an appointment with a dentist, he decided to glue the broken part of the tooth. (...) The last time I heard this story, this friend has had part of his tooth glued to it for over 30 years. I remembered it because it sounds absurd in a way. Grandpa made it up. [M4_26].

Rejecting is also considered as questioning the wisdom contained in the story, and re-positioning oneself towards the story in the present (e.g., 'Priorities are different now. First you need to settle down and then think about a possible family. A big family? That's not for me.' [M9_22]). Study participants who rejected the story by questioning its credibility attempted to explain the attitude of the story's authors. They offered an explanation, for example the author's desire to entertain the family. In this case, the rejection was associated with emphasising a positive attitude. Colouring the past can be considered as an element of family storytelling that allows the listeners to take the stories with a pinch of salt, and to have their own opinions about them, but also to spend pleasant time with their loved ones. A different attitude was expressed by those participants who questioned the meaning of the story, or its moral. They expressed disagreement, arguing that the recalled memories did not correspond to current reality or knowledge. These participants seem to want to live according to their own rules and values, to have the right to make mistakes and define their own priorities and life goals.

Relationships between types of family narratives and adult learners' strategies to self-position towards them

The final stage of data analysis involved a cross-analysis of two categorisations: types of family narratives corresponding to the three levels in the ecological systems model theorised by Fivush and Merrill (2016) and distinguished strategies of positioning towards the family narratives. The findings are presented in Figure 1. The combinations of types of family narratives with strategies of positioning oneself in relation to them presented in Figure 1 result from the analysis of the collected data. It does not mean that other combinations are impossible. In other groups or in relation to other stories, these connections could be different.

Figure 1. Types of family narratives related to young adults' strategies to position themselves towards them. (Source: Author's own)

Me in the family (micro-system)	My loved ones in the family (exo-system)	Family history (macro-system)
co-construction construction	co-construction negotiation rejection	co-construction negotiation

Construction as a strategy of young adults positioning towards family narratives occurred only in relation to narratives from micro-systems. Only this type of story referred to the recalled events in which the narrator both participated in and remembered. Therefore, a participant presented their version of events in their version of the story, of course current at the time of participation in the research and writing the story. It may change. Additionally, the narrator may be aware that other characters in this story may tell it in a different way, according to how they remember and interpret the past. In turn, co-construction was associated with family narratives from all three levels in the ecological systems model. Young adults actively engage in the construction of family stories by recalling the story 'behind someone else', transmitting it further and at the same time transforming it. This strategy is present even in telling stories from one's own biography (micro-system). During storytelling, learning from each other takes place in the family, which may even result in changing the earlier version of the story. Co-construction is intertwined with construction. Only narratives from exo-systems were met with rejection. These are family stories that concern events they did not participate in, but are told by other family members. For various reasons, they question their credibility or the lessons that result from them, and at the same time, they dare to reject them. They do not have such courage in relation to stories about old times, family history, family legends or myths that belong to the macro-system. After all, these have a certain 'fixing' in universal history, not just family history. When they disagree with something included in family narrative from a macro-system they merely negotiate, but do not reject.

Young adults' positioning of family narratives is related to learning. Narratives reflect what they have learned. This is not only about the knowledge they have acquired about the past of their family, its members, or themselves, but also about the ways in which family members have understood past events and their own (re)interpretations of

family stories. The featured strategies of positioning oneself in relation to family narratives indicate the possibility of distinguishing between learning from narratives and learning through narratives. The family narratives available to a person are a source of knowledge about the world, people (including family), and oneself. This is the essence of learning from narratives. On the other hand, learning through narratives consists in taking a stance towards the learned narratives and creating one's own stories on their basis, translating the acquired knowledge into a language understandable to oneself, searching for a connection between the content of the stories and the knowledge one has, one's own life experience, and vision of oneself in the future. Learning through narratives may be expressed through a critical approach to family narratives and the interpretations contained in them, as well as re-positioning oneself and adopting a different narrative. Changes do not have to occur only at the level of narrative, but also in the course of life, self-image and family image (e.g., making a decision not to start a family, breaking off an oppressive family relationship, or not celebrating family traditions).

Discussion

One important form of communicative activity is storytelling. Each family has its own stories and memories that can (or cannot) be told. Stories and memories can be recounted by individuals, although sometimes as part of joint storytelling. If family members develop a common heritage, their shared stories will be treated as 'family' narratives. However, individuals will always tell the 'same' story in different ways. Some relate to events shared by relatives, while others describe the experiences of selected family members, but are seen as so important that they are passed down from generation to generation. Some are or become less significant for some reason, while others more so. Some stories, once told, are forgotten, while others remain in the memory of family members for their entire lives. They often come back to some, are recounted many times, and although it is the same story, it is told in different ways each time. There are also some stories which, although well remembered, are not told: they remain unspoken because they evoke shame, fear, suffering, sadness, anger, or other negative emotions.

Young adults are creators and recipients of family stories, and at the same time they participate in transmitting them to family members and people outside the family. Additionally, they can become future transmitters of family narratives for subsequent generations. The results presented in this paper offer understandings of different strategies of self-positioning towards family narratives that young adults put in place. The obtained results confirm that people in early adulthood have access to all types of family narratives distinguished in the ecological family narrative systems model (Fivush & Merrill, 2016, see also Merrill, Booker & Fivush, 2019; Mazurek, 2023, 2024). Moreover, the narratives they indicate as the most frequently recalled in their families are those that referred to the further history of the family and the lives of ancestors whom they themselves did not know (macro-system) and those that concerned events from the biographies of their grandparents, parents or other relatives in which they did not participate (exo-system). Despite the growing distance between generations, young adults are familiar with family narratives regarding the experiences of older relatives and even their own ancestors. Certainly, these narratives concern more family members compared to those from the micro-system, which is why they are recalled more often in families. However, it should be recognised that they are important for the process of identity construction by young people: they help them build a coherent story about themselves and their family, and provide knowledge about their roots. They asked their relatives to tell them stories, although it also happened that family narratives from the macro-system were remembered

by young adults because they were often told by the oldest family members, which resulted from their need for intergenerational transmission or simply to reminisce about old times. Additionally, family stories set in the context of difficult global events such as war, deportations, or resettlements occupy an important place in the memory of Poles. Although the characters of the stories and their recipients are separated by several generations, they are significant to young adults. Some of them feel responsible for passing them on to subsequent generations. They treat some family narratives as life lessons (see also Budziszewska, 2015, Mazurek, 2024), others as stories worth saving from oblivion, and still others as family anecdotes.

According to previous research (Ashbourne & Baobaid, 2014a, 2014b), both the narrator and the receiver of a story engage in creating meaning of the experiences recalled in the narratives. These interpretations do not have to be compatible or even complementary. They are related to how people position themselves in relation to the remembered experiences or the received narratives. In the research presented in this paper, young adults use different strategies to position themselves in relation to family narratives: construction, co-construction, negotiation, and rejection. Each of these is an active strategy that engages the young adult in interpreting the family narratives they listened to or family narratives related to events from their own biography. Young adults construct or co-construct family narratives, but they also negotiate their content or the messages they contain, or they reject them. Generations benefit from the wisdom of the legacy of the previous ones – also contained in narratives – but sometimes negotiate with the content of the messages or reject them (Dryll, 2021; Drężek & Dryll, 2021), or even question their credibility.

The strategies of self-positioning towards family narratives identified in this study can be related to four different positions that adult learners take in relation both to knowledge and to the teacher or educator: passive reception, task-oriented activation, self-directed intentionality, and playfulness (Formenti, 2024). Passive reception of family narratives did not occur in the analysed empirical material. Perhaps because self-positioning in relation to narratives is always an active process, requiring involvement and arousing emotions. Or perhaps because it is easier to actively refer to a narrative than to knowledge. Other positions in relation to knowledge are interwoven with strategies of self-positioning in relation to family narratives. The study participants made an effort to write a family story and responded to it, independently searching for its meaning for themselves. For some, this situation was probably caused by participation in the study, while others had already made such an effort earlier, when they were reflectively thinking about the meaning of family narratives for their life story. These efforts should be associated with task-orientated activation and/or self-direction. The study participants who recalled funny family stories emphasised their role in the family: building bonds, spending time pleasantly, the personality of the characters/authors of the story, or the image of the family. Although they sometimes negotiated with these narratives or rejected them, they were a source and space for learning. It can therefore be assumed that although the four strategies of positioning oneself towards the family narrative do not fully overlap with the strategies of positioning oneself towards knowledge, they are intertwined to some extent. According to Laura Formenti (2024), the educator can take on different roles in teaching an adult. Sometimes they will be complementary to the positions taken by the learner, and sometimes there will be great disharmony between them. This lack of complementarity can be an opportunity for learning. A similar process can happen during narrative learning, which occurs during storytelling in the family. The different perspectives of the narrator and the recipient of the narrative, presenting their points of view, can be both encouragement for learning and a space of learning. Ivor Goodson et

al. (2010, p. 127) emphasise that narrative learning is 'not solely learning from the narrative, it is also learning that goes on in the act of narration and in the ongoing construction of the life story'. Family narratives can be part of the life story. Learning from family narratives refers to acquiring intersubjective knowledge about the past of the family, while learning through family narratives involves interpreting them and creating one's own understanding of them. Young adults' strategies to position themselves in relation to family narratives distinguished in the presented study show that young people appreciate family narratives – including those that refer to old family history – but at the same time they notice that some stories have become outdated and the world they live in now requires new stories. They construct new ones, based on their own life experiences, but also change those they have learned, revealing their attitudes towards them.

Limitations of the study

Although the chosen method seems appropriate for conducting research on strategies of young adults' positioning through family narratives often recalled in their families, there are several limitations to this study. Firstly, the use of the family narrative sheet in written and electronic form allowed for the collection of a fairly large number of responses. However, the written data collection form did not provide an opportunity to ask additional questions of the study participants. Such questions would have been desirable in that they would have deepened insight into both the adults' positioning towards recalled family narratives and learning from and through the narratives. Furthermore, the written form may limit the expression of people who prefer to speak rather than write. Interviews would provide such opportunities. Secondly, limited diversity in the sample is another limitation. For this reason, the findings may not be applicable to young adults from single-parent families or those not brought up by their biological parents. It can be assumed that reaching out with invitations to a more diverse group of individuals would provide a deeper picture of the discussed issues. Finally, the study participants were only people in early adulthood. In future studies, it would be worth knowing how adults later in life position themselves in relation to family narratives. Comparing the perspectives of different groups of adult learners could be very interesting.

Conclusion

The results presented in this paper offer understanding of different strategies of self-positioning towards family narratives that young adults put in place. The results of the presented study confirm that young adults have access to all types of family narratives listed in the ecological systems model of family narratives (Fivush & Merrill, 2016). Young adults apply different strategies to engage with family narratives, such as construction, co-construction, negotiation, and rejection. Construction refers to the creation of a family story based on the narrator's personal memories, where they are the central character. This strategy allows the storyteller to present their version of events, though it may evolve over time. Co-construction involves telling stories that were learned from others, but adapting and transforming them based on the storyteller's own understanding. In turn, negotiation is associated with a sceptical and cautious approach towards family narratives by young adults. They may question the credibility of the mentioned events or consider the life lessons to be irrelevant to their own lives. In some cases, young adults completely reject family stories, especially when they find them implausible or incompatible with their personal beliefs and contemporary values. As a

result of rejection the narrative, they re-position towards it in the present. These strategies are related to the types of family narratives. In the analysed empirical data, construction is used for family narratives from the micro-system, co-construction is applied to stories from all three levels of the ecological systems model, negotiation is applied to exo- and micro-systems, and rejection occurs only in relation to family narratives from the exo-system. It is worth emphasising that more strategies to position oneself towards family narratives are possible, as are other combinations between them and the types of family narratives.

Furthermore, self-positioning towards family narratives is seen as a learning process. Family stories provide young adults with knowledge about their family roots, the past of individual family members and about themselves, including from childhood, which they do not remember. The narratives transmitted within the family contain interpretations that have been given to past events by family members. Sometimes these interpretations are repeated for generations, but they are more often modified by individual storytellers who position themselves in relation to the narrative. Young adults, like other family members, have the freedom to re-position themselves in relation to family stories, myths, legends, and secrets in order to build their own ideas, values, and identities. Self-positioning is variable over time, undergoes transformations, and, like learning, has a lifelong dimension. The narrative can therefore be 'a tool for learning' (Goodson & Gill, 2011, p. 111). Learning from narratives refers to acquiring knowledge about the past. This knowledge comes not just from the factual content of the stories, but also from the way the family interprets and understands the events. At the same time, and more crucially, 'the on-going act of narration and re-narration – the modification and adaptation as well as the verbal reiteration of our life narrative' (Goodson & Gill, 2011, p. 111) is learning. Self-positioning towards family narratives is a process in which learning occurs. Learning through narratives involves actively engaging with and interpreting family stories, creating one's own understanding based on them. Attending to a family narrative allows for a flexible response to it. As it was found, one can adopt a strategy of construction, co-construction and negotiation, or completely reject a family narrative. These strategies are a flexible narrative response to new and changing circumstances and opportunities. This finding is significant, considering that storytelling in the family can strengthen family bonds and provide intersubjective knowledge about the family. On the other hand, family stories can disrupt or even destroy family relationships and build misleading knowledge. Each recipient of a family narrative interprets it independently based on their own knowledge, experience, and emotions. There is enormous potential in this, because it can, for example, interrupt the transmission of oppressive, harmful content contained in stories, or explain previously stigmatised behaviors and attitudes in a new way than before, or provide a new interpretation of past events that takes into account the current socio-cultural context or the biography of the storyteller. Thus, both the storyteller and the recipient are learners. The transformations of family narratives are endless. It is a process that is constantly happening within and outside of families. Self-positioning in relation to family narratives is crucial to these transformations.

Notes

[1]   To maintain the anonymity of the research participants, the following designations were adopted: W - woman / M - man, research participant number, age of the research participant.

Declaration of conflicting interests

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Emancipating older learners: On the problems of naïve consciousness and the enlightened teacher

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Abstract

The tension between education and emancipation is a recurrent theme in educational philosophy but remains comparatively neglected in critical educational gerontology (CEG). CEG is a philosophical strand in older adult education aiming at the social emancipation of older learners. CEG links radical emancipation to the outcome of raising older learners' presumed naïve consciousness with the help of an enlightened teacher. In this essay, we argue that the logic of radical social emancipation features theoretical contradictions at its roots, which translate into empirical ambiguities when employed to raise older learners' consciousness. We address two problems: (1) older learners' naïve consciousness and (2) its subsequent dependence on teachers' critical consciousness. To solve these problems, we propose Jacques Rancière's logic of educational emancipation, focusing on the individual's capacity to learn by presuming intellectual equality as a pre-condition for learning rather than an outcome as with CEG. By treating this perspective in older adult education, we hope to emancipate CEG itself by refocusing its scope primarily on the educational realm.

Keywords: Jacques Rancière, older learners, critical educational gerontology, emancipation, older adult education

'It is not inequality that is the real evil, but dependence' (Voltaire, 2005, p. 51)

Introduction

The relationship between education and emancipation is fundamental to educational philosophy. Theoretical debates have highlighted the emancipatory potential of education, including that of independence, autonomy and liberation. Starting from analyses of the power relations innate to all pedagogical relationships, scholars have, however, questioned whether education and freedom can co-exist and stressed how education can reproduce dependence, infantilisation and oppression (Depaepe & Smeyers, 2008; Southwell & Depaepe, 2019).

In (older) adult education, emancipation from oppression remains a pursuit-worthy goal (Wildemeersch, 2014; Findsen, 2007). Despite broader theoretical discussions on the interplay between older adult education and emancipation (Formosa, 2011; Findsen, 2007; Glendenning & Battersby, 1990), questions can still be raised concerning the character of emancipation and the position of the teacher: (1) is the scope and character of the emancipation of older learners we strive for intended to be a collective and socially encompassing outcome or an individual classroom-bounded pre-condition for learning? (2) What role could the educator be assigned? Furthermore, and (3), how can this role be achieved without inflicting more stultification? Re-treating these research questions is precipitated by the recently revived debate over the relevance of critical educational gerontology (CEG), a philosophical strand in older adult education. This debate, in part, problematised CEG's traditional reliance on Freirean radical pedagogy, as well as its framing of older learners' consciousness and the role ascribed to teachers (Percy, 1990; Withnall, 2010; Hachem & Westberg, 2023).

In this paper, we examine and take aim at the relationship between CEG and radical emancipation in *five steps* in order to respond to the three questions raised earlier. Our epistemological position is anchored in a multi-disciplinary approach that enriches our arguments by drawing on educational philosophy, sociology, and community psychology. We first introduce our rationale for treating two key problems with CEG's current logic of radical social emancipation. Second, we present notable developments in CEG. Third, we flesh out CEG's logic of emancipation, tracing it back to its radical roots, followed by a summary of how it has been enacted in empirical interventions. In the fourth step, we analyse and underline several ambiguities and contradictions in CEG's theory and practice. The fifth and last step consists of proposing Jacque Rancière's (1991) logic of intellectual emancipation as a way to overcome said ambiguities.

By taking these five steps, this article is, first and foremost, a long-due response to CEG's coupling to Freirean (1972) radical emancipation. Furthermore, it fuels the fascinating debate on the learning philosophies in older age via Rancière's perspective on intellectual emancipation as a pre-condition for teaching older people. We begin with presenting the paper's rationale for treating two problems.

Step 1: A rationale for treating two problems

The CEG is a learning philosophy that answers central questions on the teaching and learning of older people. It embeds a radical classical emancipatory agenda, and its scope covers collectivities at the level of society at large. CEG adopts Paulo Freire's (1972) critical pedagogy, enunciated in the celebrated *Pedagogy of the Oppressed*. CEG was initially conceived to counter 'false' emancipatory education for older people by

redressing philosophically designed learning opportunities. CEG is intended to promote the emancipation of older learners by stressing 'their collective capacity to empower themselves' (Findsen, 2007, p. 553) and designates a critical teacher to actualise this goal (Formosa, 2002, 2011).

CEG starts from the belief that older people are oppressed to weave its emancipatory logic (Formosa, 2011). Their oppression not only manifests itself in age-based discriminatory policies and limiting social structures but also via the internalisation of self-defeating and crippling ageist discourses, which prevent them from identifying the effects of ageism on their lives. Thus, CEG strives to 'unsettle the complacency that older people feel about social conditions' (Glendenning & Battersby, 1990, p. 228) so that they become the subjects of their lives and develop the capabilities to decode the workings of power on their realities. This is paramount to CEG, in light of what the predicament of ideology entails: 'It is precisely because of the way in which power works upon our consciousness that we are unable to see how power works on our consciousness' (Biesta, 2017, p. 55). Here, CEG stresses a unique role for teachers, premised on a striking difference in consciousness levels between them and older learners. The enlightened teacher, an organic intellectual in Gramsci's (1971) terms, is given the responsibility to raise older learners' consciousness in order for them to decode the workings of power on their social realities and lead them on the path of 'analysing, resisting and challenging structures of power' (Inglis, 1997, p. 4), denoted hereafter as *social emancipation*.

Meanwhile, to raise older learners' consciousness, their teacher must aforehand be emancipated (Freire, 1972). An emancipated teacher has the competence, talent and intelligence to analyse realities and see beyond ideology and power structures. Ultimately, under the patronage of CEG, revolutionary capacities, possessed initially by the teacher and eventually endowed in the learners, are summarised as critical reflection and action (Formosa, 2011). Together, they form a praxis or a path to radical social emancipation in its classical understanding (Laclau, 2007). If this path is incomplete, it results in/from *verbalism* (critical reflection without action) or *activism* (action without critical reflection) (Freire, 1972).

Despite wide reception, CEG's radical emancipatory logic provoked several critiques and fuelled debates over the relevance of and mechanisms of emancipation with older learners (see Percy, 1990; Withnall, 2010; Hachem, 2023; Hachem & Westberg, 2023). We condense these into two main problems, which we aim to treat in this paper. Problem one is that CEG risks painting an ambiguous and reductive picture of older learners' consciousness and intelligence, allowing unequal relationships between ever so more intelligent teachers and ideologically confused older learners until they prove otherwise to the critical teachers; only then could a dialogue of equals start (see Biesta 2017). However, until that point, radical social emancipation may remain a preliminary promise to a future-oriented goal. Problem two emerges from this future-oriented nature of emancipation, which automatically sustains a difference in consciousness and extends older learners' dependence on their teachers' critical consciousness. This is evidenced in empirical works showing that this promise of social emancipation is difficult, if ever possible, to realise, often ending with what Freire would label with verbalisms. Consequently, extended contact with critical teachers (e.g., Formosa, 2012; Formosa & Galea, 2020; Nye, 1998) is called for.

Given the above, we caution that CEG's radical emancipatory logic may hide an underlying admission to some inequalities characterising older learners. Politics, Cerletti (2005) argues, cannot start from inequality and annul it via corrective measures, be they educational or political, to render equal the unequal: 'he[she] who parts from inequality, believing in it, will admit it' (p. 86, translated from French by the authors). Instead, the

existence of inferior actors, including those allegedly with inferior consciousness, should be renounced starting in the 'classroom'. CEG's current logic leaves room for raising three research questions which will guide our paper: (1) is the scope and character of the emancipation of older learners we strive for intended to be a collective and socially encompassing outcome or an individual classroom-bounded pre-condition for learning? (2) What role could the educator be assigned? Furthermore, (3) how can this role be achieved without inflicting more stultification?

To answer these questions, we are inspired by Danny Wildemeersch's pioneering works (2014, 2019, 2020) in revisiting what emancipation is good for in adult education. These works guide our understanding and treatment of Jacques Rancière's (1991) postmodern logic of *educational emancipation* in the celebrated *The Ignorant Schoolmaster*. Meanwhile, Rancière's assumption of the equality of intelligence is the pillar for our overarching argument that CEG's radical social emancipation no longer adequately serves the emancipation of older people despite its laudable results in teaching them about and raising their awareness on socio-political issues. Next, we present a brief but telling history of CEG.

Step 2: Summary of CEG developments

The goal of emancipating older learners has roots dating back to the early 1980s. The 1980s witnessed the birth of a critical social gerontological movement in the United Kingdom (UK), the first to engage critically with 'apocalyptic constructions of ageing' (Doheny & Jones, 2021, p. 2325). This movement later enthused the rise of a radical emancipatory agenda for educating older people, baptised CEG, which promulgates a Freirean critical pedagogy to counter social inequality, oppression, sexism, ageism and racism via educational interventions. CEG received foundational contributions from the UK's Chris Philipson and Frank Glendenning and later witnessed significant developments by scholars in Australia, New Zealand, Malta, and beyond (see Table 1).

Table 1. The main features of CEG. Source: Adapted from Hachem (2023)

Feature	CEG in the works of Battersby, Glendenning and Findsen	CEG in the works of Formosa
Academic worldview	Critical social theory (Marxism) and critical pedagogy (Paolo Freire)	Critical social theory (Pierre Bourdieu) and critical pedagogy (Paolo Freire)
Older learners	Are powerless, oppressed and naïve	Are oppressed and possess differential power levels
Motives for learning	Class struggles and false consciousness	Class struggles and habitus
Educational goal	Empowerment and emancipation	Empowerment and emancipation
Teacher's role	Liberator	Educator/leader

In 1990, Glendenning and Battersby officially dubbed the theory and praxis of critical older adult education as CEG. First, they rejected a functionalist approach to educating

older people, which viewed them as a social problem. Instead, they argued for a political economy framework for educational gerontology, which examines society's treatment of older people based on their social status and resources. Second, they demanded that CEG serve older adults' interests while arguing that their education cannot be conceived as a miraculous cure for the lack of critical reflection but rather as an ideological approach to the theory and practice of moral education. Third, CEG aims to transform society. Glendenning and Battersby enriched CEG with concepts like empowerment, emancipation, transformation, social and hegemonic control, and conscientisation. Thus, educating older people cannot be practised without addressing these concepts since 'neutral' education is, by default, domesticating. Finally, in countering banking education, the fourth principle highlighted that CEG is dialogic, predicated on the notion of praxis, and fosters a dialectal relationship between theory and practice.

Later, Battersby and Glendenning (1992) elaborated their rationale for endorsing CEG in their initial statement in four points. First, they insisted that education is not necessarily self-evidently good. Second, they claimed that older adults are treated as a homogenous group even though they are not. Third, they argued that geropsychology research on older learners needs to be problematised. Fourth, the field of educational gerontology had, until then, lacked clear philosophical foundations. Additionally, Battersby and Glendenning highlighted the dire situation older adults endure; they asserted that they are oppressed. That is so because they are victims of many inequalities related to social class and age. Meanwhile, they warned that older people are unaware of this oppression. Thus, their education must strive to liberate them. To that end, the teachers' role is to enact Freire's critical pedagogy and apply his praxis of critical reflection and action, leading to their social empowerment and emancipation. Aligning with these ideals, Brian Findsen (2002, 2007) was enthusiastic about Freirean pedagogy and promoted its adoption in older adult education. Even if Findsen (2002) saw that a humanist approach to older adult education is virtuous, he insisted that the socio-political realities of older people deserve a more radical engagement. This engagement, he argued, is possible via a tight coupling of CEG to the teachings of the *Pedagogy of the Oppressed* (Findsen, 2007).

Apart from Findsen's endorsement of CEG, the movement had already grown wider with Marvin Formosa's 'critical geragogy'. Formosa (2002) developed critical geragogy as an alternative to Malcolm Knowles' (1984) andragogy. It was meant to convey Freire's notion of praxis and be the practical translation of CEG. The guiding tenets of critical geragogy are: (1) fighting ageist structures (2) by mobilising collectivities and recognising individual learning needs; (3) not any education is empowering to older adults; (4) teachers are not only facilitators but rather leaders who are committed to their sufferings; (5) hence the need for extending education to distinct segments of older adults, not only older learners, while resorting to (6) a self-help culture that is (7) counter-hegemonic, an agent of social change.

While Formosa (2011) revised the vision of CEG, he remained loyal to a critical agenda for later life learning, citing its continued relevance. Referring to Erich Fromm (1979), Formosa noted that even the inner drives of humans under capitalism are only culturally embedded forms of domination serving the current status quo. Despite that, he added that CEG principles have to be more modern since 'Marxism has gone out of fashion' (Formosa, 2011, p. 324), and human agency's record levels have led to the fading of some social inequalities under neo-liberalism. Formosa problematised 'zero-sum' power relations, favouring instead Bourdieusian notions of power in terms of differences in capital through which social inequalities manifest (Formosa, 2006). Hence, Formosa (2011) (re)endorsed the Freirean pedagogical tradition as a countermeasure to banking

education and destined CEG to provide a transformative rationale which uncovers and mitigates social inequalities. He stressed that the latter requires the help of 'educators' who are knowledgeable, competent, and capable of guiding their students towards higher levels of critical consciousness. Furthermore, Formosa called on CEG to promote listening, love, and tolerance to increase solidarity and fruitful dialogue among learners. Finally, he defended the relevance of a revolutionary praxis in founding age-related social movements and forging alliances between groups of like-minded older people. Formosa's renewal of CEG was echoed favourably in the field and became the go-to approach to enacting critical pedagogy with older people. The nature of this enactment is clarified next.

Step 3. CEG's emancipation in theory and practice

Emancipation, or liberation, can have various meanings. Community psychology, for example, defines emancipation as

> […] a process entailing a social rupture in the sense of transforming both the conditions of inequality and oppression and the institutions and practices producing them. It has a collective nature, but its effects also transform the individuals participating, who, while carrying out material changes, are empowered and develop new forms of social identity. It is also a political process in the sense that its point of departure is the conscientization of the participants, who become aware of their rights and duties within their society, developing their citizenship and critical capacities, while strengthening democracy and civil society. (Montero & Sonn, 2009, p. 1)

In adult education, radical emancipation often refers to 'analysing, resisting and challenging structures of power' (Inglis, 1997, p. 4). It entails overturning oppressive structures (Inglis, 1997) via a radical form of social mobilisation (von Kotze et al., 2016), leading to but also resulting from raising the consciousness of the oppressed. Oppression is, then, the unjust exercise of power and the control of ideas and resources to produce and sustain social inequality (Watts et al., 1996) and alienation from the authentic condition of human beings (Freire, 1972). Oppression is not confined to political, social, and economic natures but is also psychological; see Table 2 comparing three major definitions of emancipation and oppression.

Table 2. Comparing logics of emancipation. Source: Adapted from Biesta (2017)

	Modern logic of emancipation (banking education)	Freirean logic of social emancipation	Rancière's logic of educational emancipation
Oppression	Material and discursive power imbalance and ideology.	Alienation from the authentic condition of human beings.	The belief that one cannot learn, think, and act for oneself. An act of rejection of one's freedom.
Enacting emancipation	Providing learners with the truth about their objective condition.	Shared inquiry between teachers and learners involved in action and reflection.	Revealing an intelligence to itself.

| **Focus** | Teacher-centred. | Learner-centred. | Thing-centred. |

According to Montero (2009), liberation from oppression is a matter of willingness, knowing and doing. Since consciousness-raising is crucial to emancipation, the latter would not be complete without the mobilisation of consciousness and the production of historical knowledge about oneself and the world. Freire (1972) defines critical consciousness as the antidote to oppression and the perception of social, political, and economic contradictions (critical reflection) and a behavioural stance against oppressive realities (critical action). Diemer et al. (2017) add to Freire's praxis a third component, critical motivation, to define individuals' agency and commitment to addressing perceived injustice.

Via six abstract dimensions, a philosophical conceptualisation of radical emancipation is brought to us by (Laclau, 2007). The first dimension is *dichotomic,* requiring an absolute rift and discontinuity between the (educational) intervention and what succeeds it on the one hand and the pre-emancipatory order on the other. The second dimension is *holistic;* here, emancipation concerns all areas of social life since they are interconnected (cf. Diemer et al., 2017). The third dimension is *transparency*, meaning overcoming alienation and achieving emancipation leaves no space for power or representation. The fourth dimension is the indispensability of *pre-existence* of what ought to be emancipated, 'there is no emancipation without oppression, and there is no oppression without the presence of something impeded in its free development by oppressive forces' (p. 1). Laclau proposes a fifth dimension, which he calls *ground.* He contends that any true radical emancipation must leave behind everything preceding it. Hence, emancipation is not radical if the revolutionary act leaves a non-transformable residue. The final and sixth dimension is *rationalistic,* implying that complete emancipation occurs when the social real ceases to be opaque, and its distance from the rational is eliminated – suggesting an awakening is required.

Rationality that is induced by awakening is fundamental for radical emancipation. Clarifying [ir]rationality, therefore, is of interest to this paper. Erich Fromm (1979) speaks of an objective reality that stands beyond our senses and hinders one's awakening; 'most people are half-awake, half-dreaming […] what they hold to be true and self-evident is illusion produced by the suggestive influence of the social world in which they live' (p. 47). According to Fromm, a competent and rational authority is necessary for an awakening; perhaps, as a teacher-leader, akin to an 'organic intellectual' (Gramsci, 1971). This authority's rationality would be based on competence, and 'it helps the person who leans on it to grow' (Fromm, 1979, p. 45). For increased rationality, knowledge in the mode of being is needed. Knowledge in the mode of *being* liberates people 'from holding on to things and of one's ego' (p. 69). In contrast, knowledge in the mode of having is akin to 'banking education' fervently rejected by Freire (1972) for oppressing people and numbing their consciousness.

In order to grasp the relationship between education and radical emancipation in CEG, the term banking education is key. Banking education is a kind of education that focuses on teaching 'facts' rather than promoting a critical and reflective mindset. In that respect, banking education suffers from three undesirable traits CEG rejects: (1) the teacher teaches, the students are taught; (2) the teacher knows everything, while learners know nothing; and (3) the teacher solely designs educational activities, and learners adapt to them. Banking education uses knowledge to indoctrinate learners rather than to free them: 'More and more, the oppressors are using science and technology as unquestionably powerful instruments for their purpose: the maintenance of the oppressive order through manipulation and repression' (Freire, 1972, p. 36). Banking education

promotes educational content that remains detached from learners' realities and describes all but their life world, as in knowledge in the mode of having. It works to advance certain slogans and empty messages to occupy the consciousness of learners and distract them from using it to confront their realities as situated beings in and with the world.

In banking education, teachers are the opposites of learners; they are necessary for remedying learners' ignorance, which justifies the need for their existence. Seeing its anti-dialogical nature, banking education ensures that content is defined only by the teacher's desire to preach to his/her learners, where such 'content is in the form of… bits of information to be deposited in the students' (Freire, 1972, p. 66). To move beyond banking education, which is teacher-centred, Freire (1972) suggests a learner-centred problem-posing type of education to raise learners' consciousness via a horizontal relationship between teachers and learners, leading to a dialogue of equals. Starting from this equality, dialogue as a teaching/learning method provides the space for the encounter of '[wo]men mediated by the world in order to name the world' (Freire, 1972, p. 61) and act on/in it.

Radical emancipation in practice

Several action research with older learners describe attempting to raise their consciousness by following CEG's logic of radical emancipation. These are essentially distinct from an even larger body of literature dedicated to 'empowering' older learners from within power structures (or social mobility, see Inglis, 1997). For example, Nye (1998) used 'liberation writing' to engage older learners with their social realities. She reported that learners developed trust and comfort with one another, reached deep into their creative side and experienced 'individual empowerment.' Nye's call for social action in this group was missed, which she justified with a lack of attractiveness of political engagement to older people. She argued that they are more interested in social connectedness and concluded that 'it could be dangerous to impose a paradigm of compulsory revolution on seniors' (p. 113). Nye noted it was difficult for learners to identify as oppressed since older learners might have acted as both oppressors and oppressed throughout their (working) lives, which explains the scarcity of common issues worth fighting for.

Intending to raise their consciousness on social issues related to womanhood, elder abuse and self-neglect, Formosa (2005) designed a CEG-based educational intervention with a group of older women in Malta. He concluded that the 'practice of critical geragogy succeeded in making them [learners] more aware of the hegemonic nature of "normal" learning in older adult education' (p. 402). However, some participants expressed concerns over being 'othered' by the teacher due to an overemphasis on their gender, but also by being designated as oppressed. In another study, Formosa (2012) sensitised his study participants to age-friendly projects at the local municipal level. Although participants demonstrated critical reflection by laying out an inclusive, age-friendly plan for policy advocacy, to the author's disappointment, the path from critical reflection to critical action was incomplete. Formosa grounded the reluctance of his learners' to 'act' (i.e. submitting their proposal to the local council) in their conservative nature and their hesitancy to 'rock the boat' (p. 48); that is, to bring about change.

Formosa and Galea (2020) faced similar results. Their action research explored the possibilities and limitations of critical consciousness with 12 older adults. This time, participants selected generative study themes such as transport, communication, and Tai Chi. The authors opted for an 'egalitarian' position with the learners, offering non-directive support when needed. They reported that, with the help of CEG, older

participants developed a deeper understanding of inequalities concerning life chances, and they questioned and analysed the dominant status quo and the embedding of power dynamics within normative ways of living. However, the authors noted that 'no ability or potency to act upon structural constraints was perceived at the end of the learning program' (p. 67). Eventually, they justified the limitations of critical consciousness with immanence and self-limiting narratives, internal ageism, and political activism as a narrative identity that reflects a lifetime commitment to progressive action rather than a competence to be developed overnight. These realisations prompted the authors to determine, 'It is naïve to expect older learners to continue engaging in critical consciousness without any leadership whatsoever in their future lives, and some form of continuation meetings are warranted' (p. 69).

The same incomplete radical emancipation is again reported in Brown's (2020) workshops with active older citizens. Following a Freirean community-based approach to teaching older adults, the author reported that her poetry-based methodology led to some form of emancipation. She testified that her participants engaged in planning for the future when they wrote 'proposals for possible avenues for praxis', but they also benefited in terms of 'increased networking, pursuit of independent leads and engagement with broader society' (p. 27). According to Brown, these are obvious signs of critical reflection. However, she also mentioned that immanence explained their reluctance to actualise plans for social action. She added that participants' engagement in the project witnessed fluctuations between domestication and emancipation. These studies imply that although CEG-based interventions result in beneficial outcomes, especially at the critical reflection level, it is challenging to lead older learners to engage in critical action. That is to say, radical emancipation, as CEG conceives it, is hardly ever complete. We discuss this claim in the following step.

Step 4. Taking stock of CEG's radical social emancipation

Several ambiguities and contractions mark CEG's theory and practice. We focus on two gaps: The first concerns the initial unequal rapport between two levels of consciousness, where the teachers are positioned as critical and older learners as naïve. The second concerns the prolonged dependence of learners' consciousness on their teachers'.

The unequal relationship between the critical teacher and the naïve learner implies that CEG's radical logic of social emancipation faces contradictions inherent to radical emancipation itself, casting doubts on the feasibility of this educational goal. Laclau (2007) argues that the dimensions of radical emancipation presented above endure at least two contradictions: the first is between the *dichotomic* dimension and that of the *ground*. A truly radical emancipation requires that the oppressor has no neutral role towards the oppressed and that the mutual otherness involving oppressors and oppressed can never be reduced. The two parties are essentially antagonistic and use discourses having no common measure. Consequently, the emancipatory moment is never objectively described, meaning there can never be a common ground for objectively explaining the pre- and post-emancipatory orders, especially in terms of how rational these orders are. A second contradiction involves the *ground* and *rationalistic* dimensions. The latter dimension presupposes that the events leading up to emancipation are irrational, and whatever newly formed social order would be entirely rational. According to Laclau, this implication also tarnishes the rationality of the emancipatory act with power relations if the *ground* dimension is satisfied, implying that the new and emancipated social reality is equally irrational and contingent on power relations. Suppose common ground is found; emancipation is no longer radical or dichotomic; the pre- and post-emancipatory orders

are therefore equally irrational. Thus, an endemic contradiction around the *dichotomic* dimension of CEG's radical emancipation presents itself. If CEG's emancipation does not entail a chasm, it is not radical, which denies its radical essence.

CEG's supposedly horizontal dialogue of equals between teachers and older learners also leads to a third contradiction. Based on the distrust in the experiences of the to-be emancipated older learners since they are unaware of the predicament of ideology, a role for a more competent and rational consciousness is warranted (see Formosa 2002, 2011; Findsen, 2007). The mere requirement for this higher consciousness threatens the authenticity of the Freirean horizontal dialogue, and here is how. The critical teacher is to lead the dialogue of equals towards an objective and rational conclusion – they are oppressed – hitherto inaccessible to older learners. This conclusion is itself necessary for (1) the teacher to enact their role, to emancipate, given the dimension of *pre-existence*, and (2) an incomplete conscientisation process (reflection and action) calls for an extension of the teachers' role and consequently learners' dependence on their superior consciousness. Thus, until older learners admit to their oppression and become aware of its underlying mechanisms and willing to overturn them (Biesta, 2017), the teacher cannot, in reality, adhere to a dialogue of equals, risking instead, slipping into a Socratic instruction with a pre-determined conclusion and the ushering of learners to it.

What if they do not (want to) reach that conclusion? Then, a fourth contradiction emerges. While CEG is an anti-hegemonic institution, it risks promoting a hegemony of its own doing. Percy (1990) raises this concern as he disbelieves in teachers' radical emancipatory role. He objects: 'It would be theoretically possible to be fully aware of one's lack of social power but quite able to pursue self-actualisation as a goal' (p. 236), leaving no room for an educational intervention to counter a separate 'objective' oppressive reality. For example, crisis-ridden older learners who nevertheless seek enjoyment and personal growth (see Kulmus, 2021). Percy casts even more doubts over the extent and scope of teachers' role in CEG, questioning: 'how afar the influence of an educator runs in helping older adults to gain power over their own lives' (p. 234) and whether older learners can opt to remain complacent if they wish to? CEG has not thoroughly addressed these questions yet, which may imply that radical emancipation's societal and collective scope needs reconsideration, not least given CEG's empirical track record.

Empirical interventions are telltale of the ease with which the emancipatory role of a critical teacher, as described by CEG, reveals stultifying elements instead, thus illustrating a fifth contradiction. Here, we argue that these interventions unwillingly entrap older learners into a cycle of naïve consciousness, prolonging dependency on the teacher's higher consciousness (see Figure 1). Having been carried from theory to the empirical realm, CEG-based interventions reported mildly disappointing results, indicating that older learners, subject to a Freirean educational intervention, may have exercised critical reflection but have resisted engaging in critical action, i.e. stopped at verbalisms (e.g., Brown, 2020; Formosa, 2005, 2012; Formosa & Galea, 2020; Nye, 1998). The authors justify the reluctance of older learners to liberate themselves (with action) from oppression with the tenacity of learners' internalised oppression, which reveals a tautology explaining a false consciousness with no other but an uncritical consciousness. How can this emancipation be radical, then, when: (1) the *ground* dimension is satisfied since it is impossible to separate the oppressed from the oppressors (see Nye, 1998), who continue moving on a spectrum of oppression and emancipation (Brown, 2020), (2) the *rationalistic* and *transparency* dimensions are not satisfied since critical action was not undertaken (see Formosa, 2005, 2012), older learners continuously exhibit immanence (see Formosa & Galea, 2020), and risk being othered based on

sectional representation (Formosa, 2005)? It is safe to conclude that emancipation was not radical in these cases but instead opened the door for an extended dependence of learners' consciousness on their teachers', seemingly, until further notice.

Figure 1. A tautology of naïve consciousness. Source: Authors' own figure
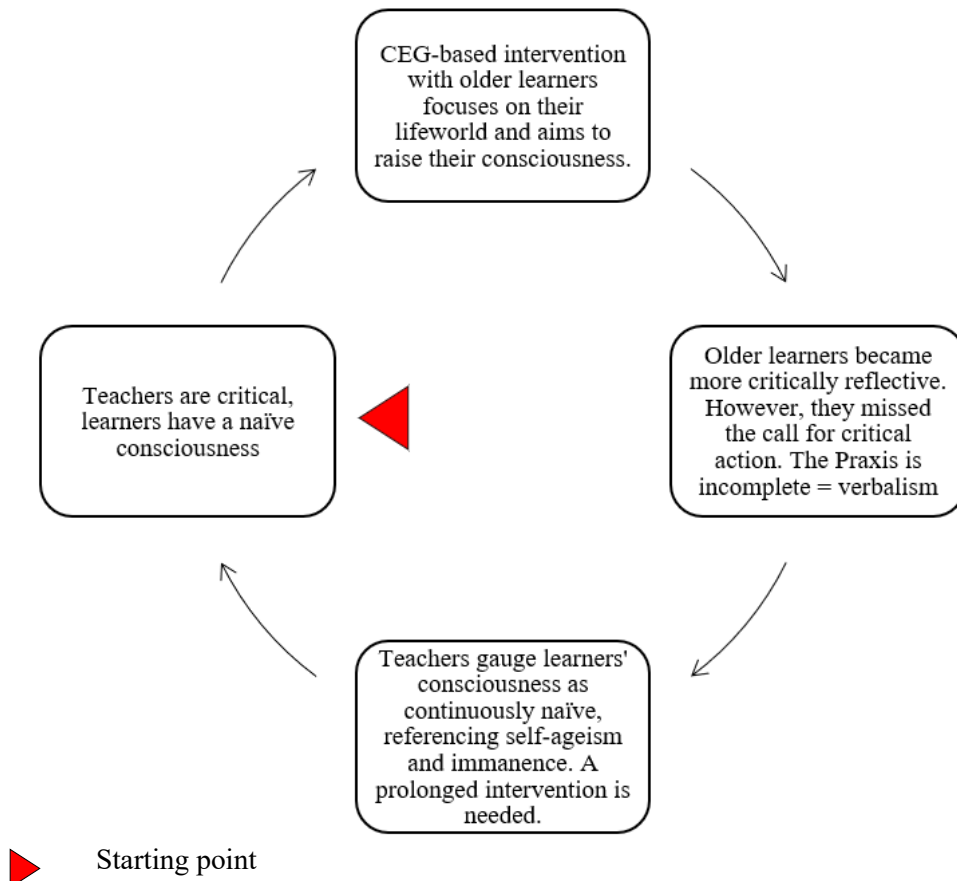
We highlight a sixth and final contradiction concerning the *holistic* dimension, or domain specificity of CEG's radical emancipation. CEG strives to counter all the -isms from an age-related departure point. Formosa (2005) provides insights into how challenging and even counterproductive it can be to satisfy the *holistic* dimension of radical emancipation, not least since other scholars also argue for its domain specificity (see Diemer et al., 2017). For example, Formosa (2005) regrets that he 'othered' his older female students when he approached them from a tight sectional gender perspective. He reckons his position as a younger male, trying to liberate older women but risking by convincing them they are oppressed, partially disempowering them in the process.

Let us suppose teachers' consciousness is not holistic since even gerontologists could perpetuate ageism and may exhibit self-ageism (Morrow-Howell et al., 2023). How can this domain-specific consciousness allow teachers to grasp (inter)sectional perspectives they have not even experienced better than their learners? Even more so to lead them on paths towards 'objective' realities they have not walked either? Competent experts, too, are confused and anxious and face increasing difficulties in leading people to emancipatory solutions and truths.[1] Then how could one known outcome exist when 'many important challenges remain unaddressed or unresolved because of the technical, political, cultural and educational complexities' (Wildemeersch, 2014, p. 825; Baggini, 2018)? Wildemeersch (2019) argues that it is not expert knowledge that is needed but

rather a commitment to a democratic public pedagogy, in which teachers and learners 'engage in a process of co-investigation… without having a clear answer of what the outcome of the process will be' (p. 178); this 'ignorance' is primordial for an authentic dialogue of equals. To achieve it, the problems of learners' consciousness and the need for teachers' intelligence to hoist the first should be addressed. Hence, this last fifth step crowns our revisit of one of the 'old masters' (Freire) notions of radical social emancipation as we ponder its suitability (Wildemeersch, 2020) in and for emancipatory older adult education.

Step 5. Rancière's intellectual (but radical) emancipation

In order to overcome the tensions that mark CEG's emancipatory logic, we suggest that CEG instead embraces an alternative logic of *educational* emancipation rather than the *social* emancipation that CEG has so far promoted. This alternative logic emerges from 'universal teaching' by French philosopher Jacques Rancière (1991), who articulated his philosophy in the chef d'oeuvre *The Ignorant Schoolmaster: Five Lessons on Intellectual Emancipation*.

Our understanding of this educational emancipation logic is based on Rancière's story of the 'intellectual adventure' of Joseph Jacotot, a lecturer in French literature at the University of Louvain, in 1818. Jacotot's adventure, on which the book is based, entailed teaching French to students who could only speak Flemish, a language Jacotot ignored. Using a bilingual (French and Flemish) version of the book *Le Télémaque,* Jacotot, hereafter, the ignorant teacher, via a translator, asked his students to learn the French text by relying on the Flemish version and repeating what they learned several times until they could recite the text in French. To the ignorant teacher's surprise, the students had learned French without explication (explanation) from him. 'What has happened once is thenceforth always possible' claimed Rancière (1991, p. 11), arguing that the system built around explication promotes intellectual oppression. 'Explication is not necessary to remedy an incapacity to understand' (p. 6); instead, the teacher needs the incapable learner to justify their role. For Rancière, they should not explicate to nor usher learners towards an objective reality (in a book or society at large). Thus, CEG's requirement for the teacher to have a higher consciousness is rejected on this ground.

Explication is oppressive since explaining something to someone is to convince them they cannot understand it by themselves (Rancière, 1991). Explication also means announcing to older learners that learning begins now and the teacher is there to mitigate their ignorance – a role the CEG teacher is willing to extend until further notice. This drive towards illuminating learners' ignorance of their objective social realities stems not from ill intent to foreground teachers' power in the social order, at least not in CEG. Instead, teacher-explicators are knowledgeable, enlightened and indeed of good faith. However, the more knowledgeable they are, 'the more evident to [them] is the distance between their knowledge and the ignorance of the ignorant ones' (p. 7). While CEG does not encourage explication per se, it premises its emancipatory logic entirely on learners' inability to decode 'objective' power relations governing their social realities without a teacher's critical consciousness. As argued earlier, CEG's supposed dialogue of equals is more akin to a Socratic type of teaching: 'There is a Socrates sleeping in every explicator' (p. 29). For Rancière, contrary to the Socratic method, the teachers' and learners' orbits of truth should ideally remain separate. Therefore, it is unreasonable to premise CEG's dialogue of equals on a difference in consciousness.

If the need for teachers is unfounded on a difference in consciousness or intelligence, what could it be based on then? With Rancière, we can assume all people, including older

learners and their teachers, are equally intelligent, which tactfully addresses this essay's first problem of learners' naïve consciousness. Instead, Rancière (1991) theorises a difference in 'will.' Teachers and learners may still differ in how strong their will to learn and to mobilise their intelligence is; in other words, how much attention they are willing to invest in learning. This impacts the teacher-learner relationship, manifesting in a shift from dependence of learners' consciousness on their teachers', to a dependence on teachers' will. Since the degree of consciousness is hard to evaluate, will, attention, and the commitment to learn are more readily verifiable. Therefore, the role of the teacher is to verify the will, attention, and efforts invested in learning, not the level of consciousness, thus addressing the second problem in this essay by evading the possibility of prolonged dependence on teachers' consciousness. According to Rancière (1991), any account by a teacher evaluating a learner's intelligence/consciousness must show factual causality. Otherwise, it reduces itself to a tautology 'in the way the *virtus dormitiva* explains the effects of opium' (italicised in the original text, p. 49). We have shown earlier how empirical applications of CEG resulted in a similar tautology with CEG teachers explaining older learners' naïve consciousness at the end of their intervention with immanence and internal ageism (see Figure 1). In this case, factual causality remains unestablished since the cause and the symptom are one.

Henceforth, we, like Rancière (1991), invite the readers to assume that teachers and learners are equally intelligent and enjoy the same level of consciousness since proving the opposite is almost impossible; they instead have differential will. Under the assumption of equality of intelligence or consciousness, the teacher would need to be/act like an 'ignorant teacher' since, otherwise, it is impossible to pre-determine an 'objective' emancipatory truth and lead learners to it (Wildemeersch, 2019), for it may not exist to start with. In this case, the so-called ignorant teacher is at an equal distance with older learners vis-à-vis the object of study, which we now call a 'thing'. This thing can be a reality embedded in a book, a symphony, a painting, or a MOOC.[2] So, what tasks could this ignorant teacher be assigned, and can they be achieved without further stultification?

Instead of verifying consciousness, an ignorant teacher uses the following provocations to verify learners' will to learn a thing: 'What one sees in it, what one thinks about it, what one makes of it' (Rancière, 1991, pp. 20-21). This ignorant teacher does not know what or how learners will answer these provocations, unlike CEG teachers who insist learners are oppressed and unaware of it, despite what learners actually think. Instead, the truth is in the object of study, the thing. Rancière (1991) compares the thing to an island, as all that's needed is there. It is a totality to which 'one can attach everything new one learns' (p. 20). It is then up to learners to discover this reality and make sense of it, all while operating under the will of the ignorant teacher, who verifies if learners invested efforts to decode the truth. But how come the 'thing' is the centre of learning rather than the learners, as with CEG? That is because, unlike with CEG, it does not matter *who* is learning since everyone can learn without explication. So long the thing is coded by an equal intelligence, assuming equality of intelligence, it can be decoded and recoded by the same intelligence without requiring another, certainly not the teachers', but it does require attention, effort and repetition. That is why teacher emancipators, or ignorant teachers, according to Rancière, mobilise learners' will to reveal their intelligence to itself, already as a pre-condition for the learning process, rather than a future-oriented goal; that is, *intellectual* emancipation, the belief that one can learn, think, and act for oneself, and accepting one's freedom. If that is so, which scope and character best describe this intellectual emancipation?

In contrast to CEG's logic of social emancipation, intellectual emancipation begins right at the start of the learning opportunity, and reasonably, the ignorant teacher's role

ends with it. This emancipation is radical, individual and loses significance on a collective level: 'man[or women] is a will served by intelligence' (Rancière, 1991, p. 55), which is indivisible and without community, meaning it cannot belong to a group, e.g. a group of older people. For CEG, social emancipation is collective and manifests in collectivities; for Rancière, if intelligence belongs to the union of people, it no longer belongs to the individual. Since the emancipation of learners is intellectual and restricted primarily to the educational context, their oppression is similar in scope. The well-described dispositional barriers to learning in older age epitomise this lifelong educational oppression. Rancière noted, 'what stultifies common people is not the lack of instruction, but their belief in the inferiority of their intelligence' (p. 39). It is the 'I can't' that stops older learners and others from emancipation. This 'I can't' is no other than pure laziness of the mind, a vice expressed upon one losing their path and forgetting who they are. Nevertheless, in this 'I can't', which CEG often dismisses as naïve consciousness, Rancière finds hope. For him, this term means 'I don't want to; why would I make the effort?' (p. 40) which also carries in it: I could, for I am intelligent.

Finally, intellectual emancipation is also radical. Compared to CEG, it fits that description better since it satisfies at least the *dichotomic* and *transparency* dimensions of radical emancipation (see Laclau, 2007). A chasm is actualised by assuming equality of intelligence or consciousness, breaking with taken-for-granted assumptions that teachers are more critical or intelligent than their naïve learners and that learning in older age is too late, difficult, or impossible. As for power, with intellectual emancipation, pedagogy is thing-centred and leaves no room for representation since one and all are equal in intelligence and stand at an equal distance to the object of study; a universal equality worthy of all.

Concluding remarks

In this essay, we followed five steps in order to identify, grapple with and solve two key problems in CEG's logic of radical social emancipation: (1) older learners' naïve consciousness and (2) its dependence on their teachers'. CEG has long been coupled with Freirean pedagogy, and despite its commendable achievements, radical emancipation was not one of them. Here, we reiterate that CEG is a praiseworthy philosophical framework for teaching older people and enticing them to decode their social realities. However, we have demonstrated that in theory and practice, CEG's goal of radical social emancipation fails to measure up to its own mandate.

This paper presents an additional logic of emancipation for CEG scholars to consider and engage with. We suggested Rancière's logic of intellectual emancipation as a suitable alternative since it addresses several of CEG's lacunae. Theorising CEG, from the departure point of educational emancipation, means (1) that the scope of emancipation is restricted, primarily, to the educational context rather than the wider society; (2) that the role of 'ignorant teachers' calls on them to verify will, attention and efforts rather than learners' consciousness levels; and (3) that this role can be achieved without further stultification by assuming equality of consciousness between teachers and older learners as a pillar for teacher-student relationships.

Apart from emancipating older learners, this paper additionally emancipates CEG. First, CEG can be set free from the functional nature of its goal (overturning wider societal structures), which extends beyond the classroom walls – a goal function CEG initially set to break away from (see Glendenning & Battersby, 1990). Second, CEG teachers are exonerated from an impossible saviour role outside the classroom. Many logics of emancipation should indeed exist, which 'opens the way to an endless

interaction between various perspectives and makes ever more distant the possibility of any totalitarian dream' (Laclau, 2007, p. 17). While enthusiasm towards Rancière's logic is warranted, we are reminded of Galloway's (2012) sobering proviso that 'neither Freire's nor Rancière's emancipatory education can be systematized' (p. 181), but systematisation is not necessarily the goal. Older adult education drives primarily nonformal and informal learning opportunities, which afford more significant potential for enacting Rancière's intellectual emancipation. Our final plea, therefore, invites scholars of older adult education to engage with this logic theoretically and empirically. We regret that word limits in this paper hindered us from (1) engaging with the broader political theory of Jacques Rancière, limiting our mobilisation of his philosophy to the educational realm and (2) elaborating on possible affinities and challenges when cross-fertilising intellectual emancipation and CEG. Consequently, these are two obvious future steps.

Notes

[1]   See Baggini's (2018) treatment of post-truth(s).
[2]   MOOCs are massive open online courses which can be studied individually.

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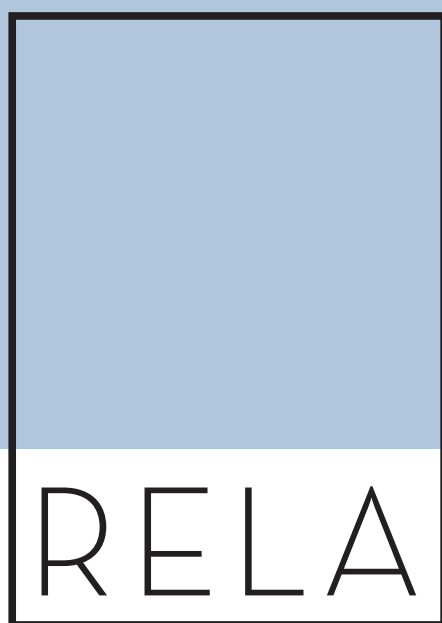
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Aims & Scope

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

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

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