Theories and Theoretical Concepts in Adult Education Policy Research

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Abstract

Even though research on adult education policies has become a dynamic and much-noticed research field in the last decades, there is no explicit theory of educational policy analysis. Instead, theoretical approaches from reference disciplines such as sociology, philosophy, economics or law are commonly adapted and applied in research on education policies. This article identifies institutionalist approaches, multi-level theoretical approaches and the governmentality concept as three key components of theory in adult education policy research. The aim is to outline basic assumptions of each of the three theoretical approaches and analyze their usage in adult education policy research. In an exemplary manner, it is explored which insights these theoretical approaches produce for the scientific community and which perspectives for further research are opened up.

Keywords: Educational policy research, adult education research, policy theory

1   Introduction

Scholarship on adult education policies has experienced tremendous dynamics in the last decades. These dynamics can be referred to international as well as to national developments in adult education policy. On the international level, the intensification of activities in the realm of adult education policies by inter- and supranational organizations triggered a series of studies analyzing both the policies as well as activities (e. g. Schemmann 2007; Ioannidou 2010; Milana & Holford 2014; Kopecky 2014). But policy initiatives on the national level also prompted studies. As an example, the adult basic education policy programs in various European countries can be referred to (e. g. Euringer 2016; Knauber & Ioannidou 2016). As often, dynamics in a particular research field initiate progress in both the development of theoretical as well as methodological perspectives. This can also be observed in the research and analysis of adult education policies.

We take this as a starting point for our contribution and intend to analyze the theoretical perspectives which are employed within studies on adult education policies. More concretely, our research interest focuses on which theories and theoretical concepts are used when researching adult education policies and how they contrib-

ute to analyzing adult education policies, i. e. what kinds of insights a certain theoretical perspective opens up.

As regards the theoretical approaches to educational policy analysis, it has to be pointed out that there is no specific theory of educational policy (Reuter & Sieh 2010). Research and analysis of educational policies rather draws back on theories from policy studies. Thus, theory offers are made from reference disciplines like philosophy, psychology, sociology, economics, education and law. As Reuter and Sieh (2010) point out, socialization theories, organization theories, multi-level theories as well as institutional theories are applied most frequently. Furthermore, policy approaches combined with learning theories have also been found quite often recently (Reuter & Sieh 2010, p. 192).

However, as regards adult education policy research, there is no systematic analysis of the theories applied. It can be observed though that institutional theories are of importance in adult education policy research. Additionally, multi-level theories have become more present in adult education policy research. Finally, governmentality studies referring to Foucault play a significant role: „While we believe that governmentality studies are not the only approach, they constitute a powerful contribution. Quite apart from their intrinsic value, we believe they have played a significant role in raising awareness of the breadth and depth of contemporary European lifelong learning politics" (Milana & Holford 2014b, p. 167).

Following these observations, we will focus on these three theoretical approaches applying the following structure within the chapters: First, we will focus on the basic assumptions and underlying principles of the respective theoretical approach. Then, we will highlight examples of the usage of the perspective in studies and focus on the insights that can be gained with the theoretical perspective. The paper will conclude by summing up the major findings and discussing further research perspectives.

2   Institutionalist Approaches

Amongst the various versions of institutional theory such as historical, discursive or empirical institutionalism (Peters 2012), it is the World Polity approach of the so-called Stanford Group around John Meyer as a special theoretical strand of neo-institutionalism that received some consideration in adult education as well. However, the World Polity approach has a common point of reference with the other versions of neo-institutionalism in sociology as well as in political and economic science in that it is not inspired by 'rational choice' theories (Hasse & Krücken 2005). Neo-institutionalist approaches assume that the action of actors in modernity can only be explained and understood by taking into account their embeddedness in the social environment. Neo-institutionalism assumes that actors in modernity do not exclusively strive for efficiency, but rather for legitimacy. Actors experience such legitimacy when they adapt to the expectations of the social environments.

The term World Polity can be understood as world culture even though a very broad understanding of culture is implied. As Krücken (2006) points out, culture is rather understood as mostly implicit background knowledge that underlies all social practices (p. 141). World Polity corresponds less to a real structure than to an imaginary cultural system that borrows central principles such as universalism, belief in progress, equality and justice, and rationalization from the stock of value and cultural patterns of Western societies. At its core, World Polity is based on a globalization thesis, since it is about "how Western principles permeate the world" (Meyer 2005).

The decisive factor in Meyer's assumptions is that certain structural forms are produced and legitimized during the process of global diffusion of these principles whereas others lose legitimacy. The worldwide establishment of education systems is also interpreted against this background. Education is thus a component of world culture and the establishment of education systems is understood as the adaptation of nation states to environmental expectations: "Education systems are established as part of this model and symbolize the effort to become a respectable member of world society or an 'imagined community' legitimized by it" (Meyer & Ramirez 2005, p. 217). Thus, by establishing education systems, nation states increase their legitimacy. However, education or educational systems are not only constitutive for the model of the nation state but within the understanding of the World Polity approach they are also worked out as a model themselves. Thus, there are widely standardized ideas about the structural aspects of the education system, about the content taught there and about the organization of education (ibid.).

Still, the criticism of the World Polity approach should also be pointed out. Meyer (2009) states that the convergence thesis in the sense of global structural adjustment cannot be sustained on closer inspection since there is much diversity between the educational systems that requires explanation.

Taking a look at the usage of the theoretical perspective in adult education, it becomes obvious that various studies have been carried out focussing on adult education policies of inter- and supranational organizations. Schemmann (2007) uses document analysis in his study and shows that both adult education policies as well as activities of the EU, OECD, UNESCO and the World Bank have been increasingly harmonizing and converging. It also becomes clear that lifelong learning turns out to be the central focus of educational policies (see also Jakobi 2009; Barros 2012; Fejes & Nicoll 2013; Milana 2012).

Jakobi (2009) uses the World Polity approach and analyses the diffusion of the lifelong learning policy. She also analyses the particular role of inter- and supranational organizations in this context. In her findings, she shows that a lot of nation-states have picked up on the idea of lifelong learning. However, since these nation states vary significantly in economic, demographic or geographical respects, functional theory cannot explain the diffusion of the idea while the World Polity approach can. Jakobi (2009) clarifies that lifelong learning has become part of the World Polity and international organizations contribute to the diffusion of the political idea.

3   Multi-Level Theoretical Approaches

For a long time, the dominant idea in research on adult education policy was the conception of direct control by the state. All approaches and models presented since the end of World War II trying to explain governance followed this "top down or legislator's perspective" (Mayntz 1998/2009, p. 15). Towards the end of the 1980s and early 1990s, fundamental doubts were growing in political science about theoretical approaches focussing exclusively on actors at the top to whom all power is ascribed. Faulstich and Haberzeth state in 2015 that in view of growing insight into the multi-level and sector-specificity of political decision-making processes, the Machiavellian notion of unilinear state leadership by the power state had to be abandoned as under-complex (Faulstich & Haberzeth 2015, pp. 264–265). As a result, there has been a shift toward theories that offer a multi-level perspective and take into account the diversity of actors involved in the governance process.

As a first multi-level approach the perspective of a *transnational policy space* is referred to. The approach developed by Lawn and Lingard and others understands the European education policy as a system of multi-level governance. This system is not understood in the sense of an exchange between rigid and clearly separated levels, but rather as a fluid system of governance, characterized by a permanent interpenetration of national, sub-national and international as well as supranational levels (Lawn & Lingard 2002). The metaphor of space refers to the fact there is not a single place or time (e. g. at a world conference on adult education or a ministers' meeting) where a specific adult education policy is generated, presented and disseminated: "The idea of 'space' is much more a way to perceive a new area, only partially visible, which is being shaped by constant interaction between small groups of linked professionals, managers and experts" (Lawn & Lingard 2002, pp. 291–292). Within this transnational political space, a permanent process of translation and mediation of political discourses takes place between the participating actors, i. e. "between state and EU offices, between agencies and subcontractors, between academics and policy managers, between experts and officials, and between voluntary and public sector workers" (Lawn & Lingard 2002, p. 292). So far, this perspective has only been referred to in adult education research (Schemmann 2009) but has not yet been used in an analytical way.

Another multi-level theoretical approach is the perspective of *Educational Governance*. In the following, this approach will be characterized since it is increasingly used in adult education research (Schemmann 2014, 2015; Engels 2018; Herbrechter 2018). After almost 30 years of intensive study of the governance perspective, it is still not possible to provide an all-encompassing definition of governance. However, we understand governance in an analytical rather than a normative way as referring to all forms of societal and social coordination of action. As a consequence, the hierarchical action of the nation state is just one form or variety. In addition, other forms of hierarchical and non-hierarchical as well as public and non-public regulation and control also come into view.

Altrichter (2015) characterizes the approach by the following characteristics:

- First, the coordination of action is at the core of interest. The management of interdependencies of collective and individual actors is brought into focus.
- Furthermore, a large number of actors and actor constellations are taken into account.
- Actors always base their actions on institutions or an institutional system of rules. This ensures security in decision-making processes.
- Another distinctive feature is the multi-level perspective on social systems. Here, the focus is on action beyond the nation-state level and below the sphere of influence of governments.
- Finally, mixed and hybrid forms of coordination of action are distinctive. This points to the fact that different forms of coordination of action not only coexist, but also interact and influence each other.

It was a group of political and social scientists from the Open University of Hagen who further developed the governance perspective in a series of publications and, above all, systematically applied it to the education system. In the meantime, the concept of Educational Governance has become established for this purpose and an impressive number of studies focusing on schools and universities have been presented in the series of the same name (e. g. Maag Merki, Langer & Altrichter 2014). In adult education, the perspective of Educational Governance has been increasingly brought into the analysis (Schemmann 2015; Herbrechter 2018).

As regards policy analysis, it was Euringer (2016) who used the Educational Governance in her study on administrators' understanding of the term adult basic education. The Educational Governance approach comes to the fore in her study when analyzing the change of discourse on governance in adult education. While the discourse was dominated by a state-centred perspective during the 1960s till the 1990s, several authors started to question this perspective as of the mid 1990s and made it clear that the governance of adult education had to be understood as a process of co-construction of various actors on various levels of action (Schrader 2008). As such, the interdependence between actors as well as forms of coordination between ministries or departments within ministries or between states come to the fore which have an impact on the decisions of administrators. Based on this theoretical framework, Euringer (2016) sets out to analyze the administrators' understanding of adult basic education. In her study, the multi-level theoretical approach of Educational Governance opens up a distinct analytical framework for exploring administrators' understanding of adult basic education and how it interacts with and is intertwined with other actors and their actions in the field of adult basic education.

4 Governmentality Approach

In the research field of adult education, Michel Foucault's theoretical concepts of power and governmentality have been extensively used (Fejes 2008). The related method of discourse analysis has further become a central instrument of policy research in adult education (see Breyer in this volume). Foucault's concepts of power and governmentality will be explained and discussed here considering their potential and limitations as theoretical reference points in adult education policy research.

Foucault's concept of power significantly differs from the common idea of power in that power is not depicted as an attribute to a person or entity but as a relational concept: "In reality power means relations, a more-or-less organized, hierarchical, co-ordinated cluster of relations" (Foucault 1980, p. 198). Foucault (1983) claims that "power as such does not exist" (p. 217) but is created only through actions and relations between groups or individuals. As such, Foucault's notion of power is described as "relational and discursive" (Fejes and Nicoll 2008, p. 6).

Building on his notion of power and transferring it to the macro level, Foucault (2007) presents his notion of government which is also significantly different in meaning compared to the one that is commonly known. Instead of comprehending government as a political body, Foucault assumes that government is rooted in everyday-life interactions, meaning in the relations of power that everyone is involved in. This also includes the "relations to ourselves" (Fejes 2014, p. 115). Thus, this alternate notion of government allows to grasp not only the government of the state but also the government of ourselves and of others (Fejes 2014; Dean 1999). In relation to this concept of governmentality, Foucault also deconstructs the prevailing idea of the state. The state is not regarded as an actively operating actor but is instead assumed to be "an epistemological pattern of assumptions about how governing should operate" (Fejes 2014, p. 115; see also Fejes and Nicoll 2008; Hultqvist 2004). Fejes (2014) concludes that the concept of governmentality leads to the analytical focus being "directed at the ways people are being governed and are governing themselves within certain regimes of practices" (p. 115).

A regime of practice denotes "the organised and routinised way in which we learn how to do things" (Fejes 2014, p. 117). It further involves "practices for the production of truth and knowledge" and "multiple forms of practical, technical and calculative rationality" (Dean, 1999, p. 28). In research, regimes of practices can be analyzed regarding their context of emergence, the knowledge immanent to the regime, how the regime relates to external influences and the techniques of operation within the regime (Fejes 2014; Dean 1999).

Furthermore, governmentality analyses can reveal insights on how governing operates and what the effects are. Here, technologies of governing become essential analytical entities. Technologies are not instruments that induce a direct output of governing. Instead, technologies are conceptualized as "assemblages of aspirations, beliefs, knowledge, and practices of calculations" (Fejes 2014, p. 116). Foucault distinguishes between two types of technologies. Technologies of power "determine the

conduct of individuals" whereas technologies of the self permit "individuals to effect by their own means" (Foucault 2003, p. 146). Governmentality, according to Foucault, then is the encounter between these two forms of technologies. As a consequence, research needs to take into account both types of technologies (Fejes 2014).

In terms of Foucault's role in adult education policy research, it can first be stated that his concepts have been extensively adapted in this research field. On the basis of an analysis of four pertinent journals, Fejes (2008) points out that overall nine percent of the articles published in these journals between 1999 and 2006 referred to Foucault. However, the references differ in terms of their interpretative depths and only a limited number of articles used Foucault's concepts in an elaborated way (Fejes 2008). In an earlier work, Fejes (2005) remarks that even though Foucault's works are a frequent reference point in research on adult education, empirical material drawing on Foucault is still limited.

Overall, Fejes (2014) argues that the use of Foucault in research on adult education policy is a "question of perspective" (p. 111) meaning that Foucault's theoretical concepts allow for alternative research questions and thus shed light on otherwise hidden aspects of reality. More specifically, these concepts can help in taking a critical perspective towards our realities and the truths that are promoted in different discourses (Fejes 2014; Fejes & Nicoll 2008). Dean (1999) states that, in contrast to theories of government, using Foucault in research enables scholars to pose 'how'-questions instead of focusing on the identification of actors or sources of governmental processes.

This can be exemplified by looking at lifelong learning which has become an extensively researched phenomenon due to its powerful role in contemporary policies and societies (Fejes & Nicoll 2008). For instance, Olsson and Pettersson (2008) explore the operation of knowledge and the construction of the lifelong learning subject by drawing on empirical material consisting of a variety of Swedish documents such as government reports or scientific texts. Fejes (2014) shows how lifelong learning can be analyzed as a regime of practice emerging through policymaking "in which a range of concepts, institutions, discourses of learning, the scientific knowledge of learning, and propositions about learning, and the like, come together to focus on those who are the objects of learning and who are subject to learning" (p. 117). Fejes (2014) points to a discursive shift from the notion education to learning which brings about several practical implications. For instance, learning becomes an individual responsibility as the formerly established relation between an educating actor and a learning student is decoupled. Thus, lifelong learning has experienced a discursive shift "from a right to a duty and responsibility" (Fejes 2014, p. 120) which extents beyond educational institutions and intrudes into other life areas such as workplace, family or media. Accordingly, Fejes (2014) illustrates how Foucault's theoretical concepts offer a starting point for the problematization of current conditions and for questioning aspects of reality that are otherwise naturally and uncritically accepted and perceived as unproblematic.

Another usage of Foucault's concepts is presented by studies that are based on the concept of governmentality and examine different modes of governing with regard to adult learning (e. g. Edwards 2003; Fejes 2005, 2006; Andersson & Fejes 2005; Olssen 2006; Berglund 2008). For instance, Fejes (2006) shows how the discourse of lifelong learning constructs "an autonomous, self-governing individual" (p. 59). He argues that these narratives of the lifelong learner are part of "a neoliberal mode of governing where there is no 'direct' visible governing" (Fejes 2006, p. 65). Thus, the state is assigned the role of an enabling entity while the subjects are self-regulated actors: "and it is in the choices and actions of the subjects themselves that the state is inscribed" (ibid.). Accordingly, Fejes (2006) observes a mode of governing in which "to govern is to get the subjects to govern themselves" (p. 74) through specific techniques such as guidance and the recognition of prior learning (validation).

As a critique towards governmentality approaches, it is often argued that rationalities are depicted as homogeneous and thus, neoliberal governmentality appears as an obligatory developmental path without any alternative (Wrana 2012). Furthermore, the dimension of acquisition, of individual and wayward oppositions, is neglected within these theoretical frameworks (ibid.). Combining Foucault's theoretical concepts with Bourdieu's field theory can help in productively overcoming at least the latter aspect of criticism (Wrana, 2012). Furthermore, it is remarkable that the reference to Foucault as a theoretical orientation mark often comes along with a research approach that is primarily argumentative and rarely empirically based (Fejes 2005). Of course, this does not count for studies using discourse analysis since in this context, theory and method are inextricably linked (see also Breyer in this volume).

Still, while theoretical concepts such as World Polity or educational governance offer explanatory frameworks for policy-related phenomena or processes, Foucault offers conceptual frameworks, often referred to as a toolbox, that enable researchers to look at these phenomena or processes from a different perspective. By deconstructing commonly used notions and concepts, Foucault urges researchers to take a fresh perspective and to reveal blind spots in their approaches which allows for a fundamental criticism of existing structures, practices and discursive patterns.

5 Conclusion

With the aim of shedding light on theories and theoretical concepts applied in adult education policy research, this article focused on institutionalist approaches, multi-level theoretical frameworks and the governmentality concept since these were identified as key concepts in the research field. Even though there is no pertinent theory for educational policy and there is an ascertained overall "theoretical 'thinness'" (Milana & Holford 2014a, p. 6) of adult education as a discipline, it has become apparent that existing theoretical offers from related disciplines are effectively adapted and used for researching and analyzing adult education policies. The potential of the

three theories discussed in this contribution lies in their respective specific explanatory scope.

Institutionalist approaches, and in particular the concept of World Polity, provide a sound conceptual framework for analyzing and explaining phenomena of diffusion and convergence against the background of a global perspective, especially with regard to the role of inter- and supranational organizations. As such, traveling policy ideas and norms like the one of lifelong learning in the context of adult education can be identified and mechanisms of their adoption can be analyzed.

While the explanatory value of institutionalist approaches is focused on the contextual embeddedness of actors and actions, the governance approach brings the actors, their modes of actions and the coordination of action between them to the fore. Thus, policies can be analyzed as an interplay of different actors on different levels of the educational arena. However, Milana and Holford (2014a) also identify this as a research desideratum by stating that "the complexity of policymaking as a co-production process remains largely unexplored" (p. 6). In particular, the approach of transnational policy space bears a considerable potential to address policymaking on an international level.

In contrast to these explanatory values of institutionalist and multi-level approaches, the theoretical offers provided by Michel Foucault stimulate analyses that go beyond common conceptualizations and frameworks. In contrast to actor-centered theories, the concept of governmentality allows for an analysis of *how* governing operates and what effects are induced. Its potential is therefore clearly rooted in its power to open up opportunities for alternative viewpoints and perspectives on common concepts and structures, which again can serve as an argumentative basis for a fundamental critique of existing practices and discursive structures in the field of adult education policies. However, it is an essential challenge and task for researchers in the field to further promote this potential by not just remaining on an argumentative level, but by providing empirical studies that are not only loosely based on Foucault's theoretical frameworks but use his concepts in an elaborated, insight-oriented way. Here, not only discourse analysis but also innovative methodological approaches such as lexicometric analysis (e. g. Breyer 2020) might be considered. Against the background of the current developments brought about by the Covid-19 pandemic, research on how policy narratives of adult learning or modes of governing operate in this new context could produce useful insights in the future.

Overall, theoretical triangulation might help in overcoming explanatory blank gaps or blind spots of the theories discussed and in further exploiting the given potentials. Theoretical enrichment for researching adult education policies might be additionally drawn, just to mention some examples, from actor network theory (e. g. Edwards 2003), path dependency theory (e. g. Ioannidou 2010), Bourdieu's field theory (e. g. Breyer 2020; Euringer 2016), agency-structure approaches (e. g. Klatt 2014) or socio-legal perspectives (e. g. Koutidou 2014).

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