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Schlagworte: Participation; interdisciplinary theory; theoretical models; Partizipation; interdisziplinäre Theorie; theoretische Modelle

Zitiervorschlag: Boeren, Ellen (2023). *Conceptualizing Lifelong Learning Participation. Theoretical Perspectives and Integrated Approaches*. In: *Internationales Jahrbuch der Erwachsenenbildung 2023. Researching Participation in Adult Education*, S. 17-31. Bielefeld: wbv Publikation. <https://doi.org/10.3278/173910W002>

E-Journal Einzelbeitrag
von: Ellen Boeren

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aus: Internationales Jahrbuch der Erwachsenenbildung /
International Yearbook of Adult Education 2023
(9783763973910)

Erscheinungsjahr: 2023

Seiten: 17 - 31

DOI: 10.3278/173910W002

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Conceptualizing Lifelong Learning Participation – Theoretical Perspectives and Integrated Approaches

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Abstract

This contribution argues the need for participation research in adult education. It reviews leading theoretical viewpoints to understand who does or does not participate in adult education including psychology, economics, sociology and organisational sciences. It then integrates these different theoretical explanations into a comprehensive lifelong learning participation model. This new approach highlights the need to study participation through the lenses of interacting stakeholders at the individual, organisational and governmental level.

Keywords: Participation; interdisciplinary theory; theoretical models

1 Introduction

The research field of lifelong learning participation has significantly moved on in the last 60 years. In its essence, participation studies engage with questions on who does and does not take part in adult learning activities and why. This chapter will shed light on the different theoretical angles that have been presented in the literature over the years. It will argue that traditionally, participation was studied through different disciplinary lenses but that attempts to come to integrated approaches have been undertaken in recent years (Boeren, 2016). It will also demonstrate that participation studies have grown from individual-level studies to the construction of wider multilevel frameworks as tools to investigate participation. As such, participation in lifelong learning has grown to be an interdisciplinary area of research.

The chapter is structured as follows. Firstly, it will provide a short account of why the study of participation in lifelong learning remains an important issue. Secondly, it will dig deeper into leading disciplinary theories that have been used by scholars to investigate participation. Thirdly, it will present interdisciplinary and integrated approaches to study participation, more specifically through engagement with Boeren's Comprehensive Lifelong Learning Participation Model (Boeren, 2016). Finally, a number of recommendations will be made on how to further expand the field of participation studies.

2 The argument for lifelong learning participation research

Lifelong learning in this chapter recognises the need to learn from cradle to grave but especially zooms in on participation in adulthood. This typically refers to the take up of learning activities after one has left the initial education system. These activities can take place in formal as well as non-formal education, including those organised in workplaces. Formal education refers to organised learning activities for which adults receive an officially recognised qualification after successful completion (Colley et al., 2003). Non-formal learning also takes place in organisational settings but is not credential-based. In recent surveys, it has been operationalised through reference to “open or distance education, on the job training, seminars or workshops and other courses or private lessons” (Van Nieuwenhove & De Wever, 2022). While informal learning on an incidental or non-intentional basis can also make a valuable contribution to adults’ lives, these types of activities tend to be less represented in participation studies (Boeren, 2016). Current educational policy discourses from leading international organisations underline the need for adults to participate in learning throughout life (see Holford et al., 2022). The European Commission’s current focus is on guaranteeing that adults have the skills to actively contribute to the labour market, especially needed in light of the transition to an increasingly green and digital economy (European Commission, 2019). Additionally, the Commission’s focus on lifelong learning participation is included in its Pillars of Social Rights. On an annual basis, by 2030, the Commission strives toward an adult participation rate of 60 percent, referring to those between the ages of 25 and 64. Surveys organised at European level to measure participation include the Eurostat Adult Education Survey and the quarterly Labour Force Survey. Participation in lifelong learning as well as the continuous focus on reskilling and upskilling are also dominant in the educational discourses of other international governmental organisations such as the OECD (OECD, 2019). Similar to the European Commission, they argue that ongoing engagement with learning activities is essential to cope with the changing demands of the labour market as well as with rapidly evolving technological advancements that have an effect on the use of skills at home. The OECD’s Programme for the International Competencies of Adult Skills measures participation in adult learning activities as well as cognitive skills in relation to literacy, numeracy and problem-solving in technology-rich environments (Boeren & Iniguez-Berrozpe, 2022). While the OECD’s and European Commission’s work has often been criticised for putting too much emphasis on the economic aspects of lifelong learning, UNESCO’s work traditionally pays more attention to the humanistic perspective as well (Elfert, 2019). In their approaches to adult learning and education, it is argued that the development of citizenship skills and social cohesion can equally function as important outcomes of lifelong learning participation. As a result of CONFINTEA VI in Belem in 2009, – an adult education conference organised roughly every 12 years – a number of leading domains of adult learning and education were highlighted that need ongoing monitoring. These were in the past decades undertaken in a series of the Global Report on Adult Learning and Education (GRALE) based on a survey with UNESCO Member

States (Boeren & Rubenson, 2022). The highlighted domains included policy, governance, finance and quality but also participation. It is important to note that participation is not seen as a sole domain in itself but goes together with inclusion and equity. Statistical data, although mainly gathered in the Global North, indicate vast inequalities in participation between adults from different socio-economic and socio-demographic groups (Desjardins, 2017). Educational attainment remains the strongest indicator with tertiary educated adults participating far more than those with no or low levels of qualifications (Boeren, 2016). Being younger increases the odds of being a participant while those who are out of the labour market, either through employment or unemployment, participate the least. The reasons for these inequalities will be explained below when dealing with different theoretical perspectives. A statistical overview is presented in Table 1 for the EU-27. Data are taken from the Labour Force Survey 2019, the last year before lockdowns because of the COVID-19 pandemic. The reference period for participation is 4 weeks prior to being surveyed.

Table 1: Participation rates (in percentages) in adult education and training (LFS 2019)

Overall participation	10.8		
GENDER		ACTIVITY STATUS	
Male	9.8	Employed	9.5
Female	11.9	Unemployed	10.5
		Inactive	7.6
AGE		EDUCATIONAL ATTAINMENT	
Age 25–34	17.8	ISCED 0–2	4.3
Age 34–44	11.0	ISCED 3–4	8.5
Age 45–54	9.0	ISCED 5–8	18.7
Age 55–64	6.2		

To conclude, participation in adult learning is perceived as important as it can help stimulate employability as well as social cohesion and thus relates to human capital as well as social justice perspectives. Given its broad aims, it is important to fully understand which underlying dynamics contribute to the (non)participation of adults.

3 Theoretical perspectives used to study lifelong learning participation

3.1 Psychological and behavioural perspectives

Psychological studies underlining the motivation of why adults do or do not participate in adult learning have been important throughout the last century (Boeren, 2016). These studies tended to put a strong emphasis on the needs of the learner and thus followed a rather individual perspective approach. An example of a leading reference in this field is Houle's "The inquiring mind: a study of the adults who continue to learn"

(Houle, 1961). Based on a small-scale qualitative study with 22 learners, Houle arrived at a three-category typology of adult learners: (1) those who participate for their intrinsic joy of learning something new, (2) those who are motivated by external forces such as wanting to obtain a degree or a better job, and (3) those who participate in learning because of a social need to meet new people. Houle's typology has been empirically tested through large scale survey data, notably through the Education Participation Scale by Boshier (1973). Additional work was undertaken to better understand attitudes towards participation in adult education by Blunt and Yang (1980) resulting in three overarching attitudinal components: (1) enjoyment of learning, (2) importance of adult education and (3) intrinsic value. Reasons to participate in adult learning or not have also been explained through engagement with Vroom's expectancy-value theory (Vroom, 1964). Expectancies refer to the judgement on whether efforts will likely lead to expected benefits. If yes, the adult might decide to undertake actions to perform well. Values refer to whether these benefits are being perceived as desirable and valuable and whether the effort is seen as worthwhile by the individual itself. An adaptation of the expectancy-value theory in the field of lifelong learning participation was designed by Rubenson (1986), who highlighted the intrinsic motivational forces at play in relation to becoming a participant. The Theory of Planned and Intended Behaviour has also been used in participation research, especially given its focus on the role of the development of an "intention" to engage with certain behaviour (Fishbein & Ajzen, 1980). Applying this theory, an intention to participate in an educational activity can be predicted through the adults' attitudes towards learning, their subjective norms towards it and the level of control they experience from others, for example employers, to take part (Van Nieuwenhove, 2022). These mechanisms seem relevant for low- as well as high-educated adults although highly educated adults feel more pressure from others to participate.

From a behavioural perspective, psychological mechanisms can also be explained in the light of economic judgements. A theoretical approach to a cost-benefit analysis underlines the need for individuals to arrive at a balance between the costs and sacrifices they have to make versus the benefits they expect to get out of their initial investment (see Boardman et al., 2018). For example, participation in an adult learning activity might be financially expensive. The time the adult has to spend in class or on engagement with self-study cannot be used to earn additional income. As such, there is an opportunity cost too. If the expected outcome is not going to reach a certain return on investment threshold, the adult might decide not to participate. The reasons why some of these cost-benefit analyses tend to differ between adults from different socio-economic and socio-demographic groups will be explained in the sociological section below. Cost benefit analyses can also be applied by employers or policy makers influencing adults' participation. For example, Human Capital Theory (Becker, 1964) claims that levels of knowledge and skills accumulated through the education and training system can help to achieve higher levels of economic productivity and organisational access. These observations can be used by these employers and policy makers as an argument to invest in the stimulation of lifelong learning among their employees or

citizens, or to prevent them from participation if they perceive the benefits to be lower than the costs.

3.2 Individual group perspectives: dominant sociological theories

As mentioned above, statistics on participation in lifelong learning demonstrate ongoing inequalities between adults from different socio-economic and socio-demographic groups (Boeren, 2016). Linking back to cost-benefit analyses, this might be the case because the costs are greater for some which makes it more difficult to come into balance with the perceived benefits. In fact, these benefits and rewards typically remain uncertain until received in practice. For example, starting a learning activity might not automatically lead to gaining the qualification in case the adult does not succeed in the assessments.

The literature on inequalities in lifelong learning often references the highly influential work of Bourdieu (1984). His focus on social, cultural and economic capital is used to underline the differences in tools that are available to adults belonging to different groups. Those with high levels of social capital might have strong networks with people who can introduce them to the best learning offers and who can help them to open doors. The importance of social influences through, for example, parents has been labelled as “the long arm of the family” (Rubenson 2007). Cultural capital is often discussed in relation to taste and habits of people and is often used to describe how education and training establishments tend to cater for the tastes of middle-class people leading to the reproduction of class differences and higher levels of participation among the already highly educated population. Economic capital is important as activities in the post-initial education and training sector might come with a financial investment, either direct in terms of enrolment fee or indirect as a result of loss of paid working time. Given the persistent inequalities in participation, the topic is often discussed in terms of the Matthew effect (see Boeren, 2016) underlining the cumulative nature of education and training over the lifespan. This runs the potential to in fact widening instead of narrowing gaps between different groups over time. While adult learning can be engaged with in terms of compensating for earlier missed educational opportunities, it is more likely it will attract those who have already achieved a positive and successful educational trajectory. This leads to reversed effects on how education should be supporting the change in individuals’ status over time, a core concern of social mobility theories (see Elliot Major & Machin, 2020).

The inequalities for different groups can be further unpacked by engaging with the core determinants of participation at the individual level (Boeren, 2016). Educational attainment is by far the most important one. Those with no or low levels of qualifications need a longer time to achieve the same level of educational credentials as those who finalised tertiary studies during initial education. Their investment in learning can therefore be very time consuming. Additionally, they are more likely to be in jobs for which they carry out more repetitive skills and receive less incentives to upskill or reskill, especially if they are working in shortage occupations. While the unemployed might profit from participation, for example in training as part of Active Labour Market

Policies (ALMPs), data in several countries demonstrate that those in the typical knowledge intensive jobs are more likely to participate in adult education activities. The cost benefit logic says that the fact that they already have a job makes their expected benefits more likely and thus more attractive for employers to invest in them. The same logic applies to the participation of younger adults compared to those in the older age groups (Findsen & Formosa, 2011). Someone who is 25 years of age is likely to spend the next 40 years in the labour market while someone aged 55 only around 10 years. Thus, there is a longer time span to profit from the initial investments made in younger employees. Older adults can of course also participate in lifelong learning for leisure purposes but we know from the statistics that around 75 percent of participation tends to be work-oriented. While educational attainment remains the most significant predictor of participation, the work-related focus also explains ongoing fluctuations in participation rates of women (EIGE, 2019) and migrants (Boeren, 2019). Given their higher likeliness to work below their qualification level or in case of women in part-time positions, they tend to receive fewer incentives from their employers to engage in learning. Data from the Adult Education Survey demonstrated that, on an annual basis, 75 percent of men in Europe received training during their working hours. For women, this percentage was found to be 64 (EIGE, 2019). Feminist theories' core aim is to further explore these gender inequalities (see Leathwood & Francis, 2006; Fraser, 2003) while migration studies have an ongoing focus on language related barriers as well as practices of potential discrimination in the workplace. While migrants are more likely to participate in formal learning activities such as basic education and language courses, analyses by Boeren (2019) on OECD data revealed they are underrepresented in work-related learning.

3.3 Organisational perspectives: workplaces and education and training institutions

Organisational theory is relevant to the study of participation in lifelong learning. It deepens our understanding on the organisational structures and cultures of institutional settings and can also be used to further knowledge on efficient and effective leadership and management styles of those in charge. One complexity in relation to the study of participation in lifelong learning is that learning activities can in fact take place in a wide variety of settings (Boeren, 2016). Typically, these are adult education centres, community centres or other organised settings that organise formal and/or non-formal education and training (Boeren & Whittaker, 2018). Additionally, workplaces are also a massive provider of lifelong learning activities and can include offers for apprenticeships or dual learning in cooperation with providers of formal adult education.

One reason why organisational structures are important is because they can generate a whole set of barriers on their own (Cross, 1981). Constraints to participation in lifelong learning for adults are often studied in relation to situational, dispositional and institutional barriers. Situational barriers refer to adults' life circumstances. For example, mothers might struggle to attend classes if they are under pressure to juggle work and family life. Dispositional barriers tend to refer to issues such as lack of confidence and can also be labelled as psychosocial barriers (Van Nieuwenhove, 2022). However,

Cross (1981), as part of her Chain of Response model, also highlighted the issue of institutional barriers. When adult education centres decide to charge very high enrolment fees, organise their learning activities during inconvenient hours or offer their courses at places which are hard to reach, they are in fact generating some barriers themselves. Darkenwald (1986) mentioned the danger of having informational barriers, claiming that many adults are simply unaware of the adult learning structures that are in place. While originally designed to study the changing landscape in higher education, Schuetze and Slowey (2002, p. 324) discussed an interesting shift from “traditional” modes of post-compulsory education to “lifelong learning” modes. In the latter case, institutional barriers can be lowered through implementing a number of organisational adaptations. In a “lifelong learning” mode, the core question is not on what institution you attended as a student but on what you learned through the activity of taking part. Another important organisational change, which has picked up over the past 20 years, has been the shift from linear structures with assessments at the end of the programme to modular structures that can be taken as separate credits. This has generated more opportunities for flexible learning instead of requiring to sit through strict timetabled sessions at once. The choice between learning at academic level without it necessarily having to lead to credentials has been facilitated by MOOCs. Apart from higher education institutions, a shift to more tailor-made flexible learning structures has also taken place in education and training initiatives for low-qualified adults (see Boeren et al., 2022).

In relation to workplaces, statistical data, for example from the Eurostat Vocational Education and Training Survey, indicate that larger businesses tend to invest more in lifelong learning activities. Their employees get more chances to participate because they have more structured human resources units that might have staff whose core job is the organisation and follow-up of training activities (Hefler & Markowitsch, 2013). The cost of running training will be more expensive for self-employed adults or those running small and medium-sized enterprises. Additionally, the learning culture of workplaces can differ, too. Some employers might want to stimulate an expansive learning climate in which employees get the chance to develop themselves in a way that goes beyond their job tasks (Fuller & Unwin, 2004). This might give them the opportunity to develop transversal skills. These workplaces tend to be employee-driven, show high levels of trust in their workers and tend to have an internal policy or action plan on the facilitation of workplace learning. They also tend to stimulate collaborative learning. Other employers might decide to pay for restrictive learning activities only. This would only include education and training that increases skills directly applicable to an employee’s job. Workers are thus seen as those who are paid to carry out certain tasks and who are not necessarily committed to learning new skills. Employers’ interest in their wider personal development is thus limited. In these workplaces, necessary training is also more likely to be offered by external partners.

3.4 Structural theories explaining variation in participation between countries

Sociological theories of the welfare state have been applied to participation research in lifelong learning. This type of research has been undertaken to further investigate the strong differences in participation between different countries. In Europe, there is massive variation in participation rates although some patterns can be recognised. An overview of these differences is presented in Figure 1.

Work by Esping-Andersen (1990) is often used for this type of research and has included additional references to gain insights in the heterogeneity of the Eastern European countries who joined the European Union at a later stage (see Fenger, 2007). Esping-Andersen's work initially distinguished between the Nordic welfare state, the Anglo-Saxon welfare state and the Conservative-Corporatist welfare state. The Nordic welfare state, which in the EU-27 includes Denmark, Sweden and Finland, is characterised by strong levels of decommodification, ensuring immunization of market dependency, and by lower levels of social stratification. This is reversed in the Anglo-Saxon countries such as the Republic of Ireland, the United Kingdom – which is no longer part of the EU – but also the United States. These countries feature stronger systems of neo-liberalisation and the provision of services operated by private providers. Conservative-Corporatist countries, like Germany and Belgium, have stronger levels of decommodification but especially protect those in employment. They tend to have stronger levels of social stratification, already visible at a young age through school systems underpinned by early tracking (Bol & van de Werfhorst, 2013; Strello et al., 2021). Esping-Andersen's initial work has been expanded to include Mediterranean countries who have stronger culture traditions of providing social support within families. Eastern European countries have in the literature been labelled as dependant market econo-

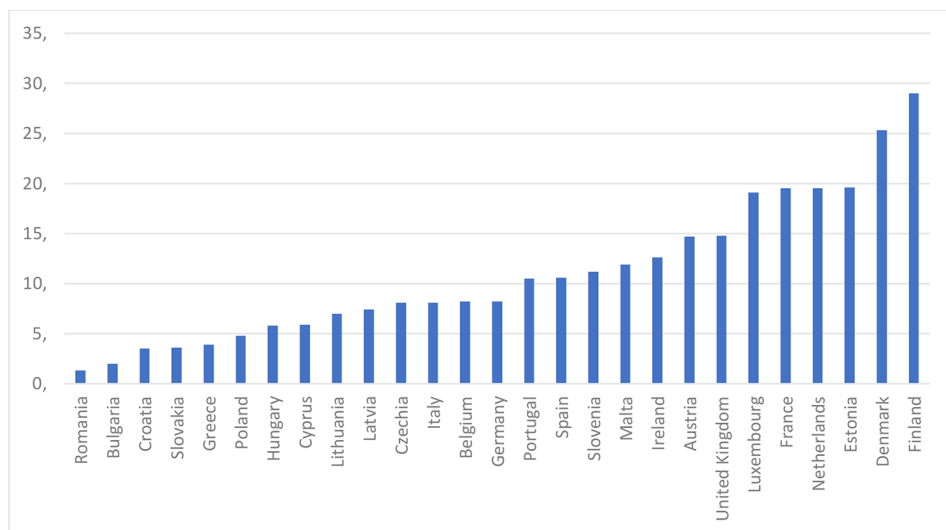


Figure 1: Participation rates (in percentages) in the EU-27 countries and the UK (LFS 2019)

mies who cooperate with larger cooperations elsewhere although contrasts between countries within the region exist (Nölke & Vliegenthart, 2009). For example, Estonia has accelerated its technological infrastructure while economic progress catching up with the West is still a relevant issue in Balkan countries such as Romania and Bulgaria. Participation rates in these countries remain low.

Data collection on participation in lifelong learning tends to be more structured in the Western contexts, especially through the work of Eurostat and the OECD. Insights in the situation across the world have been gathered by UNESCO as part of the monitoring of the Belem Framework of Action. The latest GRALE report, GRALE 5, included data from 155 countries across the world (UIL, 2022). In asking whether their participation rates had decreased, remained the same, or increased compared to what they reported for GRALE 4 in 2018, just over half of all countries (52 percent) stated that it had increased. A total of 28 percent of countries said it had stayed the same versus 13 percent said it had decreased. The remaining 7 percent of countries did not provide an answer. While the reliability of these responses is difficult to trace, the report provides separate answers for regional as well as income groups. Based on their responses, participation had increased stronger in Asia and the Pacific and Sub-Saharan Africa as was more likely to stay the same in the Arab States. The Latin American group had the highest percentage (21 percent) on decrease in participation. In terms of income groups, lower middle-income countries reported the strongest increase (67 percent) versus 50 percent in low-income countries, 48 percent in high-income countries and 41 percent in upper middle-income countries. While these GRALE statistics give us a first flavour of potential differences in participation rates going beyond the typical Western focus of countries in participation research, more in-depth studies in this area are needed to fully understand the impact of structural determinants of participation.

4 Integrated approaches to the study of lifelong learning participation

As demonstrated in the text above, participation in lifelong learning has been discussed in terms of adults' individual motivations, their socio-economic and socio-demographic background characteristics but also in relation to the wider structures in which they are embedded. The combination of these different forces resembles theoretical advancement that sits with structure and agency approaches (see e. g. Giddens, 2013). Two notable outputs underlining this renewed way of thinking were published in the international literature in the years 2009–2010. The first one was a paper by Rubenson and Desjardins (2009) in *Adult Education Quarterly* in which they presented their Bounded Agency Model. The second one was a lifelong learning participation model developed around the same time as the Rubenson and Desjardins model. Boeren published her theoretical advancement to the field of participation studies in the *International Journal of Lifelong Education*, together with her doctoral supervisors Nicaise and Baert (Boeren et al., 2010). Later on, Boeren (2016) further developed this area of re-

search as part of a new Lifelong Learning Participation Model, published in a monograph for which she won the Cyril O. Houle Award for Outstanding Literature in Adult Education in 2017. The Bounded Agency Model strongly starts from the variation in types of welfare state regimes and confronts broader structural conditions and policy measures with adults' dispositional barriers. Throughout this work, Rubenson and Desjardins (2009) underline how perceived realities are socially constructed within the welfare context in which the adults live. The mediation between the individual and the structures can therefore result in 'bounded agency' to participate in adult learning.

The 2016 Lifelong Learning Participation Model by Boeren is built around three major players and incorporates the level of the education and training providers. She argues that these actors need to cooperate with each other in order to reach satisfactory participation rates in adult lifelong learning. The model intentionally moves away from the traditionally strong focus on the individual's responsibility to take initiative to participate but incorporates the actions of education and training providers as well as responsible governments. As discussed above, actors at the systematic levels can make a positive contribution to lowering the institutional barriers and make entry into learning opportunities more accessible. At the individual level, the model represents both psychological-behavioural characteristics as well as sociological ones. These correspond to the mechanisms explained earlier in this chapter, for example the differences in costs and benefits for those who are low or high qualified and in knowledge-intensive jobs. The block on education and training providers is divided into two as well to represent the typical adult and lifelong learning centres versus workplaces as generators of training activity. These blocks incorporate the issues discussed in relation to the shift from traditional modes of education and training to more flexible lifelong learning systems. Additionally, it zooms in on the differences between restrictive and expansive learning environments at the workplace. The country level refers to a wide range of social policies that governments can implement to stimulate participation and are in line with typical differences one would find in the variation of welfare states. The model as a whole is intentionally represented through cogs. Like in the interior part of a watch, the cogs need to move around simultaneously and support each other to become efficient and effective. Applied to the case of lifelong learning participation, it means that a 'dysfunctional cog' will make it more difficult for the other cogs to move around. While an individual might be highly motivated to participate, if they live in a country that does not have lifelong learning policies high on the agenda, their citizens might struggle to take part.

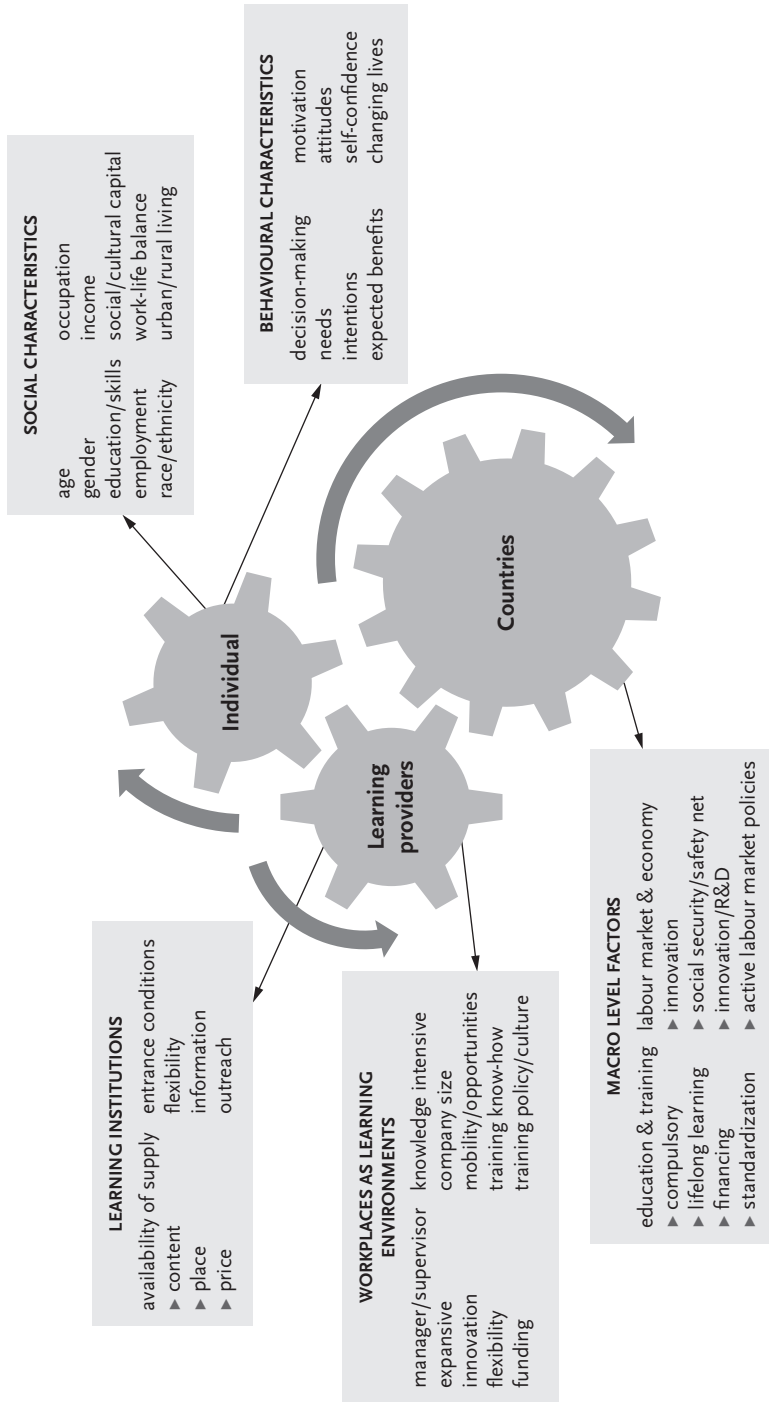


Figure 2: Integrated Lifelong Learning Participation Model (Boeren, 2016)

5 Recommendations to address the ongoing limitations of participation research

This final section of the chapter is used to highlight some of the ongoing limitations of the field and how these can potentially be addressed.

Furthering our understanding of cost benefit and expectancy value theory approaches is recommended through the collection of more advanced longitudinal data. Currently, most European countries have access to participation statistics through the Eurostat Labour Force Survey or the Adult Education Survey as well as through OECD's PIAAC data. However, in the vast majority of countries, these data tend to be cross-sectional. While these are useful data to track participation patterns over time, they fall short in following up on potential successes at the individual level. To be more specific, we have very little information about people's achieved benefits in, for example, five years after they finished a course. As researchers, we might want to engage in working with the large international organisations such as Eurostat to implement more longitudinal follow-ups. Self-organised surveys can be expensive, especially if they want to achieve a sample representative of the population.

Providing more insight on the expected benefits and values of participation in lifelong learning might also help to further unpack one of the main reasons for non-participation: the lack of interest or absence of any intentions to participate. On the one hand, this might be the case because adults' needs are already satisfied or because they do not perceive participation in lifelong learning as the pathway to fulfil these needs. It might also be the case that adults are unaware of the benefits lifelong learning participation can bring. Advancements in the measurement of intention are needed and might be employed through quantitative as well as qualitative research approaches (Van Nieuwenhove, 2022).

Research that focuses on the practices and processes of adult learning institutions in attracting adult learners, for example through reach out activities, often remains small scale (Boeren et al., 2021). These studies often follow case study approaches but are not as systematic and representative in comparison to the data we hold at the individual level. One avenue might be to explore more opportunities for mixed methods studies and to apply multilevel models to study variation of participation behaviour between and within educational settings. This approach has been applied to for example the OECD's PISA data. However, PIAAC data do not provide opportunities to engage with these types of analyses.

Additionally, while research on the different types of welfare states has been published in recent years, it might be valuable to further unpack the reasons why there seems to be little progress in increasing participation rates in the different countries. While GRALE 5 data seem to suggest that participation in adult learning is increasing, this is not very obvious from the European micro-data that are available through the Labour Force Survey. Previous research found that some of the adult education interventions in the Eastern European countries might over-rely on European incentives such as the European Social Fund instead of governments making a longer-term in-

vestment in post-initial education and training infrastructures. Additional research could potentially shed light on the lack of advancements in building these national infrastructures on their own.

Finally, in a world that becomes increasingly global, researchers might want to undertake more participation research in countries in the Global South and further advance theories and knowledge in this area through engagement with contexts that differ from the traditional Western approaches. This type of work could draw on – for example – existing scholarship in the field of higher education exploring capability theories in the South African context (see Walker & McLean, 2013). Adding onto this knowledge base could potentially lead to novel insights on how we currently conceptualise participation in the field of lifelong learning.

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