CHAPTER 4

The Pulse of Freedom and Transformative Learning: Winding Paths, Blind Alleys, and New Horizons

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Introduction

One of the most significant lines of division in the field of transformative education research relates to what should be used as the primary unit of analysis for thinking about and fostering emancipatory learning processes. The decision, explicit or implicit, to concern oneself mainly with individuals or primarily society in analysis is highly consequential and remains an enduring line of division among scholars of transformative education and learning. I want in this chapter to argue that this line of division is based on a false dichotomy which frequently leads to unproductive debate and unnecessary confusion. To paraphrase the US novelist Thomas Pynchon (1973/2000) if we begin by asking the wrong questions, then

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the answers do not matter. The key contention of the chapter is that to advance this debate we need to be able to conceptualize learning and transformation in relation to emancipatory desires, interests, and experiences in a dialectical and nuanced manner (Eschenbacher, 2019; Hoggan et al., 2017; Fleming et al., 2019). This chapter will outline one way of thinking relationally about persons in society through a reconstructive critique of the work of Jack Mezirow. In the first part, I will offer a novel way of framing and contextualizing Mezirow and transformative adult education through a critical realist understanding of emancipation and reflexive agency. This will be followed by a summary of the most common criticisms of Mezirow's work as a social and emancipatory theory of learning. In the next and most detailed part of the chapter, I examine how Mezirow approaches reflexive agency, freedom, and emancipation.

All of these strands: the critical realist conceptualization of freedom and agency; the discussion of Mezirow's contribution to adult learning theory; the summary of critiques of his work; the detailed exploration of Mezirow's approach to emancipation and reflexivity are woven together at the end of the chapter. The purpose of the piece is to present an explicitly differentiated conception of transformative learning which can account for, and help foster, individual and collective forms of emancipatory agency.

Reflexive Agency, Freedom, and Transformative Learning

This chapter is an essay which has the aim of clearing some conceptual ground in relation to the way freedom and emancipation are understood in transformative learning and education. While I will not link this directly to case studies or life stories, it is important to note that the arguments are based on extensive empirical research with non-traditional students[1] and graduates in universities in Ireland and across Europe (Finnegan et al., 2014, 2019). This research employed a range of methods but

[1] Non-traditional students is a rather open and somewhat flawed term to denote student groups who come from groups that have been, and often continue to be, underrepresented in third-level education, such as mature students, working-class students, and students from ethnic minorities. The term is used in European higher education research to explore the extent to which traditional institutions are adapting and facilitating access for these student groups.

biographical[2] interviews were the most important element of this work. Participants gave open, in-depth accounts of their educational experiences and how this fitted, or did not fit, with the rest of their life.[3] A significant portion of the fieldwork comprised of longitudinal interviews with students as they entered into, went through, and came out of university into the labor market. To a very striking degree, when people spoke of important transitions, shifts, and transformations in their lives, it was linked to the desire for greater reflexive agency and freedom. Participants in this research reported very significant, deep, and transformative learning experiences, but the structural limits and institutional blocks to such learning were equally apparent in these accounts. Making sense of this, and the way this was achieved or hampered, has led me to reflect on emancipation and education (Finnegan, 2019). This, combined with my engagement with adult education literature, relational sociology, social movement research, and critical theory, has led me to develop a differentiated theory of transformative learning which explores the pulse of freedom on different scales. This research underpins the reading of Mezirow offered in this chapter.

Let me then say a little more about how learning, reflexive agency, and freedom are understood in general terms. Reflexivity is seen as the exercise of the ordinary ability to reflect on ourselves "in relation to our contexts and vice versa" (Archer, 2007, p. 4). But as Mezirow (1991) notes, critical reflection has varying levels of depth, and it is the capacity to reflect on our assumptions that is most transformative (I will say more about this below). This insight can be usefully supplemented by Gregory Bateson's (2000) account of the five levels of learning (0, I, II, III, IV) each of which is defined by an increasing of level of complexity, depth of reflexivity, and crucially for the discussion here scope. The simplest form (0) involves a response to stimulus but with no real learning, and the highest (IV) is a perhaps wholly ideal type of learning, which completely transcends the paradigms within which learning happens. The intermediate levels of II and III are the ones which are most pertinent to thinking about scope: II relates to changes in the process of learning and III to changes in the system of sets of alternatives from which we chose.

[2] See Merrill and West (2009) for useful methodological overview of the biographical approach.

[3] Approximately 200 interviews in Ireland and 1300 interviews across Europe were collected across one national and three transnational projects see (Finnegan et al., 2014).

How might the depth and scope of critically reflective learning be connected to emancipation? As the British philosopher Roy Bhaskar (1994, 2011, 1979) notes, we pursue freedom based on knowledge of our interests, the cultivation of the disposition to act for freedom, and the (re)discovery of sources of agency (Bhaskar, 1994, 2011). In other words, we move toward and into freedom through reflexive action. Emancipation here is viewed as a social process, a type of movement, which always involves learning and the development of reflexive agency of varying sorts. Reflexive agency lays the basis for various forms of emancipation which "is defined as the transformation from unwanted, unneeded and/or oppressive structures or states or affairs to wanted, needed and/or liberating ones" (Bhaskar, 1994, p. 145). This definition will be important for the discussion later in this chapter for two reasons. It can be used to envisage emancipatory processes on different scales enacted by individuals and by diverse collective bodies. Also, the description of *freedom* as the movement from unwanted to wanted determinations alerts us to the fact that the exercise freedom is always structured and context bound. This is a simple but important proposition which is at odds with the widely diffused, highly ideological, and ultimately impossible notion that freedom means unconstrained individual choice.

From this perspective, the basic desire for freedom and the complex development of powers of self-determination are rooted in the search for human flourishing (Bhaskar, 1994). Human flourishing depends on the exercise and enhancement of individual and collective powers of various sorts. Flourishing is necessarily a social and relational matter as well. This means any discussion of freedom and reflexive agency also brings us to consider questions about the just distribution and proper use of resources (Sen, 1999), and to consider how institutions and practices can be altered or developed to minimize harm and avoid unnecessary suffering (Wright, 2010). From this perspective, freedom cannot be deepened without achieving greater equality in the distribution of goods, patterns of social recognition, and modes of political participation (Fraser, 2013).

This latter point about participation is crucial—this is something that requires a type of learning for democracy. Emancipation in support of human flourishing depends on enlarging our powers of rational thought and increased lucidity about what structures society and shapes our life choices (Freire, 1972; Mezirow, 1991). As individuals, as members of organizations and institutions, as participants in social movements,

reflexive agency depends on developing shared rational and accurate interpretations of structures, states, and affairs which are corrigible, exploratory, and open (Bhaskar, 1994; Castoriadis, 1987; Freire, 1972; see also Mezirow, 1991). It also requires reform and experiment in how reflexive agency is institutionalized in decision-making processes in education, communities, workplaces, regions, and larger polities (Castoriadis, 1987). The scope of transformative learning is therefore linked to the capacity to embed reflexive participatory processes in social life.

The Paths to Freedom: False Dichotomies and Premature Resolutions in Transformative Learning Theory Research

From this critical realist and egalitarian perspective, the field of transformative education and a great deal of adult education can be described as a collective effort to elaborate an approach to education and learning in which reflexive agency for freedom is viewed as a central concern, goal, and problematic. The challenge then is to puzzle out how we elaborate institutions, cultures, and practices which allow people to take full ownership over learning and the production of knowledge so they can become more reflexively agentic in their lives and can participate in a living democracy (Rubenson, 2011; see also Finnegan, 2016; Finnegan & Grummell, 2019).

As we know, within adult education and transformative education, there are multiple, overlapping but also somewhat conflicting accounts of how to foster reflexive agency and how we might describe emancipatory interests and desires (e.g., critical pedagogy, andragogy, cultural historical activity theory, progressivism, and so forth). Mezirow's work is a major intervention and contribution to this scholarship, and remains one of the most elaborated, ambitious, and influential attempts to theorize reflexive agency in relation to adult learning.

The basic premises of Mezirow's work have already been outlined in Chapters 2 and 3. As I mentioned briefly in the previous section, I am especially interested in Mezirow's description of the varying depths at which critical reflection operates. Furthermore, one of Mezirow's fundamental concerns is how such critical reflection can support greater agency and this runs as a golden thread through the various iterations of his theory of transformative learning (Mezirow, 1978, 1981, 1990, 1991,

1998, 2000, 2003, 2007; Mezirow, et al., 1990). Of particular importance, he argues, is the developing of the capacity to reflect on our taken-for-granted assumptions in order to act in more insightful, discriminating, and rational ways. Mezirow's work is of exceptional importance in conceptualizing critical reflection and explaining why deep forms of critical reflection on assumptions (1998) are so vital in the present era.

I will explore some of these ideas in further detail below. Before I do so it should be said that the adequacy of Mezirow's work as a social and emancipatory theory of learning has repeatedly been called into question (Collard & Law, 1989; Hart, 1990; Inglis, 1997; Newman, 2012; Tennant, 1993; less directly Cunningham, 1998). Within this body, there are three substantive claims. They are: (1) Mezirow "lacks a coherent and comprehensive theory of social change" (Collard & Law, 1989, p. 102) and does not give sufficient attention to social movements, (2) that Mezirow is too strongly focussed on individual agency (Inglis, 1997), and (3) that his work is sociologically "thin" and lacks clarity in terms of political vision and analysis (Inglis, 1997; Newman, 2012).

To my mind, these arguments are well-founded and convincing. However, when we review these debates retrospectively, we encounter an interesting paradox; despite three decades of thoughtful and able critique accompanied by a good deal of heated exchange and promising dialogue (Mezirow, 1989, 1997, *inter alia*), the results have been somewhat disappointing. While there have been noteworthy efforts to unearth the social and emancipatory dimensions of transformative learning by scholars such as my colleague Ted Fleming (e.g., 2002) and Stephen Brookfield (e.g., 2000), we have seen relatively little development of these ideas within transformative learning research generally, and there is little evidence of shared research agenda on these matters (Cranton & Taylor, 2012; Hoggan et al., 2017).[4] Certainly, if one reviews the proceedings of the *International Lifelong Learning Conference* and the journals which are central to the field such *as Adult Education Quarterly* and the *Journal of Transformative Education*, it is striking how little work there has been which seeks to explicitly move beyond these early debates. There is a clear tendency of researchers to use either/or ways of thinking (Freire versus

[4] This is especially striking when we compare it with the critiques and debates which argued for a holistic and less rationalistic approach to transformative learning (Dirkx, 2008; Yorks & Kasl, 2002; etc.) and have largely succeeded in going beyond critique toward a modified and elaborated version of transformative learning.

Mezirow, modernism versus postmodernism, individual versus collective transformative processes, etc.) or more typically to disregard what critics of Mezirow have said and assume the theory is already sufficient as a social and emancipatory theory of learning.

Blind Alleys and Hidden Passageways: Thinking with and Against Mezirow

The Social and Political Dimensions of Transformative Learning

One might offer a variety of explanations for why these critiques of the social and political dimensions of Mezirow's ideas in the 1990s have had so little effect on the field as a whole. I think it can in part be ascribed to a certain amount of polemical excess about the supposed deficiency of these ideas. While the social, political, and emancipatory dimensions of the theory are uneven and undeveloped, they are certainly not absent. Mezirow's understanding of learning and reflexive agency is not asocial and is based on a creative theoretical synthesis which seeks to link theories of personal and social freedom. In fact, as Mark Tennant (1993, p. 36) has observed, the theory is explicitly "directed at the intersection of the individual and social." This orientation is evident from very early on in the development of transformative learning theory where Mezirow (1978) draws liberally on the insights of humanism and andragogy alongside psychological and psychoanalytical theories of human development, and combines them with Freirean critical pedagogy and an interest in the learning taking place in and through feminist movements. In fact, Mezirow self-consciously shuttled between social and individual points of reference throughout his career (Mezirow, 1978, 1981, 1990, 1991, 1998, 2000, 2003, 2007). For Mezirow (2007), personal and social freedom and human and community development are intricately bound up with each other. This "persons in society" framework underpins what he says about socialization and the formation of meaning perspectives (Mezirow, 1991).

Reflexive Agency and Freedom in Mezirow

In order to suggest how we might advance this critique in a new direction let us first look at how Mezirow understands reflexive agency and freedom in more detail. According to Mezirow, critical reflection requires a type of

epistemic break from the givenness of the world and requires us to take some distance from our routinized understanding of ourselves and the events and processes which shape us. In this way, we can begin to grasp:

> how we are caught in our own history and are reliving it. We learn to become critically aware of the cultural and psychological assumptions that have influenced the way we see ourselves and our relationship and the way we pattern our lives. (1978, p. 101)

Following further engagement with critical theory, three years later Mezirow chose to describe this movement toward freedom through critical reflection in the following terms:

> Emancipation is from libidinal, institutional or environmental forces which limit our options and rational control over our lives but have been taken for granted as beyond human control. Insights gained through critical self-awareness are emancipatory in the sense that at least one can recognize the correct reasons for his or her problem. (1981, p. 5)

This conception of the process and aims of deep critical reflection was developed further through the 1980s, through further engagement with the work of Habermas, and was given a full systematic expression in Mezirow's (1991) in *Transformative Dimensions of Adult Learning* which engaging in egalitarian and democratic discourse with other people is described as a vital aspect of stepping back from our assumptions.

According to Mezirow, deep reflection on assumptions always results in some type of action, however small (Bloom et al., 2015). Deep reflexivity is inextricably bound to an enhanced capacity for agency. Action is described by Mezirow in a range of registers drawing on diverse sets of theories from the existentialist inflected proposition that it is the "choosing, the deciding, that is crucial for personal development" (1978, p. 105) to discussions of the importance of taking action in pursuit of social justice (1991, 2000).

Freedom is not discussed in a systematic fashion by Mezirow[5] but the movement away from constraint and a discovery of powers of autonomy—what I called reflexive agency for freedom and flourishing in the first part

[5] It is a type of synthetic notion combines notion of freedom from classic liberalism (J.S. Mill), Kantian notions of autonomy, and more radical notions of social freedom linked to civil rights, popular education, and community development.

of this chapter—is undoubtedly central in transformative learning theory. Mezirow (1991, 2007) discusses freedom in personal terms, the breaking of what William Blake (1977, p. 143) memorably called "mind forg'd manacles" but also as the shaking off of unaccountable authority and the weight of dead traditions.

Against the claims of some of his critics, we can say that Mezirow does offer a socially situated and intersubjective theory of reflexive agency in which empowerment and emancipation are foregrounded. Crucially, Mezirow's theory is sensitized to small and large acts of freedom. However, his critics are right to point to the limits of his work: Mezirow pays scant attention to the necessity of constraint or to the social forces and structures that actively hinder or block agentic reflexivity. In these respects, the gaps in Mezirow's work are very significant and I think they can only be overcome by transformative learning researchers actively seeking to foster a much more developed sociological imagination by looking toward other disciplines and research traditions (Mills, 1959; see Finnegan, 2011, 2014).

Bracketing the Social, Foregrounding the Individual

Looking beyond transformative learning to re-evaluate and develop it in a new direction is especially necessary because of two other recurrent features of Mezirow's theory. First, while the fundamental building blocks of the theory are rooted in persons in society perspective, there is nevertheless a tendency to foreground the individual in transformative processes in the presentation of his ideas. As I have noted elsewhere (Finnegan, 2019), Mezirow's theory is especially dense and elaborated in the examining critical reflection in the remaking of an individual's assumptive world. To explicate this clearly, Mezirow largely brackets off social processes. The dynamic, layered, and conflictual nature of transformative learning within social processes is underplayed in order to offer a tidy and clear conceptualization. Diagrams in *Transformative Dimensions of Adult Learning* reinforce this as they invite the reader to treat the social context as background to the foregrounded individual's reconstruction of assumptions (see, for example, 1991, p. 67 versions of which were used by Mezirow from the 1970s onward).

I am convinced this bracketing is linked to the avowed purpose of Mezirow (1978, 1991, 1997, 1998) to develop a comprehensive theory

of adult learning which is relevant to, and resonates with adult education, researchers and practitioners from diverse settings and backgrounds. Mezirow repeatedly notes the importance of the principles of democracy, freedom, and equality as well as the need for critical social analysis in transformative learning but these matters are then left aside to provide an ideal-type description of a transformative learning process which can be readily linked to practices embedded in varying political and institutional contexts.

As with a great deal of adult education theory, there is a strong humanist and phenomenological orientation in Mezirow's work which celebrates agency. This orientation along with the mode of explication discussed above means the theory cannot fully trace the interplay of structure and agency and fails to account for the depth and power of certain social structures (e.g., the gendered division of labor, classed patterns of ownership, institutional racism, etc.).

Social Action, Personal Transformation, and Freedom in Mezirow

This ambition to develop a comprehensive theory of learning of, and for, adult education is also linked to the second issue I want to highlight in this part of the essay—the way collective agency and individual agency are viewed in relation to each to other. Mezirow (1991, 1997, 2000) consistently argues that reflexive agency takes many forms, and while he believes the capacity of an individual to reflect on their own assumptions is supportive of participatory democracy and emancipatory social action, these things cannot be treated as the sole focus or privileged end goal adult education.[6] Thus, critical pedagogy and popular education which foreground social transformation are for Mezirow only one particular form of transformative learning—a subset of transformative learning in fact—which is given no more or less value than other forms (1998).

Mezirow (1997) explains this position in some detail in his response to Tom Inglis' (1997) critique of his work and it is worth quoting at some length:

[6] Mezirow is also at pains to stress (1990) his opposition to any form of indoctrination in adult education but I think his concern with indoctrination is a straw man argument. An opposition to indoctrination was shared by key radical adult educators (Freire, 1972; Horton et al., 1990). The key fault line here is I think the emancipatory value of certain forms of political knowledge (see Hart, 1990).

> social movements come and go. What makes them possible is cultural change, meaning transforming prevailing cultural paradigms or collective frames of reference. This involves *cultural action* to build ways of thinking that make social movements and other forms of social action possible. This process is one of critical reflection on assumptions upon which conventional understanding and action are based, validating reflective understandings through discursive inquiry, and taking reflective action. In the case of changing social frames of reference, this means finding others who share your reflective insights with whom to act to effect cultural changes—in families, communities, workplaces, and on a national or global scale. Every adult educator engaged in fostering transformative learning is engaged in the process of cultural action. So is every learner who acts upon his or her transformative insights with others to effect changes in previously taken-for-granted frames of reference. Some adult educators, in some situations, will also be able to help learners learn how to take direct social or political action.

I think this set of propositions has not been responded to properly by radical critics of Mezirow. Many advocates of critical pedagogy and post-structuralist theorists of power treat politics in an almost metaphysical way. Power permeates every aspect of being; it is everywhere and nowhere. While I think Mezirow's account is flawed, for reasons I will elaborate upon forthwith, I think he is quite right to highlight the multiplicity of forms of learning in everyday life and the wide variety of life projects that call for reflexive agency. A keen alertness to the subtleties of power and a theory of social reproduction and social change is, I think, absolutely necessary for transformative education, but nonetheless many, many aspects of life (adapting to chronic illness, dealing with aging, learning about and from child rearing, etc.) are poorly described in the first instance by theories of oppression, let alone notions of will to power. A sensitivity to such needs in educational research and pedagogy is especially important in a period in which many researchers have discerned a new "reflexive imperative" in modern life (e.g., Archer, 2007) where on a day-to-day basis we need to be reflexive in order to make our way in the world. I am convinced Mezirow's realistic appraisal of the variety of learning projects and the era in which we live is part of the reason Mezirow's work continues to have explanatory value in several important respects.

My contention then is that we need a theory of transformative learning that pays attention to the power of reflexive agency on an individual level.

However, and this is linked to arguments made above already, Mezirow account is too one-sided. It is a mistake to treat collective agency as a simple scaled-up aggregate version of what happens at an individual level. Research on social movements and emancipatory social change (e.g., Cox & Mullan, 2001; Eley, 2002; Tilly, 2004; Zibechi, 2012) points to the complexities and specific characteristics and modalities of these emancipatory processes, including as learning spaces (Choudry, 2015; Freire, 1972). Mezirow's analysis of this is very undeveloped indeed and at times even simplistic.

New Horizons?

We are now in the position to bring the various parts of the arguments made across the chapter together. At the start of this piece, I made the case that emancipation is best understood as the replacement of unwanted determinations with wanted determinations through the exercise of reflexive agency in support of human flourishing. I also argued that from this perspective Mezirow's work is of enormous importance because of the contribution he makes to thinking about the varying depths of critical reflection and the importance of deep reflection on assumptions in projects of autonomy and freedom. His theory also speaks directly to the tasks and needs of a reflexive era. However, the social and political dimensions of Mezirow's theory of transformative learning are unevenly worked through and in many respects theoretically undeveloped. As a result, the theory does not offer a realistic and sufficiently nuanced framework for analyzing the scope or social impact of various transformative learning processes. These are long-standing criticisms of Mezirow's work. However, the tendency in the research field to either dichotomize between social and individual transformation or, on the other hand, view them as identical phenomena has meant these weaknesses are overlooked by many and exaggerated by others.

Moving beyond this situation requires a sustained and systematic rethinking of emancipatory transformative learning theory in at least two respects. These are: (1) developing a more tightly conceptualized notion of freedom within transformative learning and (2) working toward an explicitly differentiated and multidimensional theory of transformative learning processes. As transformative researchers and educators, I believe we need a theory which is alert to the scope and depth of various forms of critical reflection and which can differentiate between various modes

of agency and their impact on self and context. To this end has outlined a conceptual framework which integrates the insights of Mezirow (1991) within a critical realist account of emancipatory education (Bhaskar, 1994; Bateson, 2000; Castoriadis, 1987; Fraser, 2013; Freire, 1972; see also Engeström, 1987).

How might such a conceptualization be applied concretely? To offer a topical example let me turn to the COVID-19 pandemic. We can readily identify how this has sparked critical reflection at varying depths and how such reflections are intimately connected to questions of reflexive agency, freedom, and human flourishing. It has prompted a great number of us to reflect on media reports and the veracity and value of the information we receive from others; it has also led to widespread reflection on the soundness of particular public health measures and strategies. At a deeper level, the gravity of the situation has undoubtedly led innumerable people to reflect deeply on their assumptions about health, well-being, the organization of society, and humans' relationship with the environment. Some of these transformative, and potentially transformative, processes are by their nature highly individual responses to social events (thinking about experiences of grief and care in a pandemic), albeit with important social dimensions. Others (e.g., getting to grips with the assumptions that have led to the increasing incidence of zoonoses in contemporary capitalism, or tackling the assumptions that underpin vaccine "nationalism") are mainly social and political concerns. Crucially, in the latter examples reflexive agency on an individual level is important, but to lead to genuinely transformative emancipatory outcomes this will require collective forms of reflexive agency capable of reforming institutions. For social, political, and intellectual reasons, we need to be able to think across such reflective processes and to make links between them, but also to distinguish between levels of scope and impact as they pertain to emancipation.

This way of thinking about emancipation and transformative learning is a departure point rather than a destination. What I hope is that a number of transformative learning researchers can come together to approach these questions and themes in a corrigible, open, and collective way. Developing this further would entail empirically investigating the complex ways biographical change and shifts in self-understanding, significant group experiences, institutional experiments, social movement activity, and large-scale social change are linked or distinct and how these modes of reflexive agency interfere and collide with each other in the struggle for freedom.

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