Research Patterns in Comparative and Global Policy Studies on Adult Education

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Abstract This chapter frames comparative and global policy studies on adult education as an intelligible area of research, and presents a meta-investigation that, without claiming to be exhaustive, enables researchers to reflect on and interpret what connects existing studies, and identify possible gaps. It does so on a corpus of 58 academic texts produced and/or in circulation in the Global North, for the most articles in peer-reviewed journals and, to a lesser extent, books and book chapters, published in 2000–2015; in short, this meta-investigation led to the identification of four research patterns, each based on a combination of the main unit of analysis and particular research scope. By pinpointing at their strengths and limitations, the author argues for the need to cherish these diverse patterns and the necessity of scrutinising closely the type of knowledge they produce.

Introduction

Education policy represents a large political endeavour; thus, its investigation denotes a wide-ranging area of academic work. When we restrict attention on the education and learning of adults, such political endeavour embraces an extensive area of governmental work as diverse legal and administrative branches of local and national governments deliberate on it at different scales—or territorial organisations in a nested hierarchal structure of sociopolitical systems (Brenner 1998; see also Milana 2017). But national governments also form international alliances and networks that once formalised give rise to intergovernmental organisations with their own missions, governing structures and

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M. Milana et al. (eds.), *The Palgrave International Handbook on Adult and Lifelong Education and Learning*,
https://doi.org/10.1057/978-1-137-55783-4_22

modes of working. These organisations share a mandate to act in the interests of national governments, and to support things as diverse as world peace (e.g. UNESCO), European integration (e.g. the European Union) and national economic growth and betterment in people's living standards (e.g. OECD). So, at continental and global scales, different branches of these international organisations (e.g. the European Commission or the OECD Directorate for Education and Skills), and their specialised agencies (e.g. UNESCO Institute of Lifelong Learning), also deliberate on the education and learning of adults. Such political endeavour that occurs at multiple scales stretches across differentiated fields of practice (e.g. labour, education, health), each tending towards reproduction of existing social structures (Bourdieu 1993).

Against this background, it is no surprise that local, national, continental and global policy that affect the education and learning of adults at both ideational and practical levels is often referred to in research on the education and learning of adults, and this independently from the researcher's foci, interest and area of study. Often, however, reference to policy provides the background, or at best a context, for a study or investigation of something else. So, for instance, Hinton-Smith (2012) touches upon the changing policy discourse on widening participation in the UK to contextualise research on non-traditional students' (including mature students) access, motivation and experience in higher education (Waller et al. 2014, 2015). Similarly, Bartlett et al. (2000)'s brief account of the historical development of European policy on guidance serves the purpose of justifying research on the diverse range of institutional patterns in the provision of adult guidance services in selected European member states.

Different is the case, however, when we are confronted with *policy studies* for which the political endeavour that affects the education and learning of adults constitutes the very object of inquiry.

This chapter presents a 'meta-investigation' (Mainardes and Tello 2016) of *comparative and global policy studies on adult education* mostly, though not exclusively, produced and/or in circulation in the Global North (e.g. Europe and North America), and discusses some research patterns within this intelligible body of work. A meta-investigation is a process of rendering a set of academic publications the object of reflexion and analysis. As such, the meta-investigation presented in this chapter has no ambition to be exhaustive, but rather aims at reflecting on and interpreting some of the 'connections between existing studies […] [and] gaps and omissions in a given body of research [that] enables dialogue and debate' (Sandelowski and Barroso 2007: 3). Further, patterns are somewhat consistent and intelligible configurations that in this case apply to the only studies under scrutiny in this chapter; however, they may serve as indicators for reflecting on a larger body of work and for predicting possible future directions in comparative and global policy studies on adult education.

The chapter is structured in two main parts; in the first part, I elaborate on the conceptual framing of comparative and global policy studies as an intelligible area of research, and illustrate the criteria used to identify the body of work

under consideration for the meta-investigation, and the analytical strategy applied; in the second part, I present the results and argue that, at least four patterns can be identified, based on whether the work under consideration aims at: (1) describing changes and evolutions along a temporal continuum; (2) comparing (horizontally) policies by different actors, either at a certain point in time or from a historical perspective; (3) juxtaposing (vertically) policy by intergovernmental organisations with that of their member states, and assessing whether they converge or diverge; or (4) questioning and providing counter-evidence for widespread political beliefs that affects the education and learning of adults. Yet, like any categorisation, this also reduces the complexity under consideration, as at times different aims concur. Nevertheless, for each pattern, I pinpoint at its strengths and limitations, and I argue for the need to further nurture diverse research patterns, rather than privileging one or the other, as they complement our understandings of the political endeavour that affects the education and learning of adults. In the concluding section, however, I also point at the need to put under closer scrutiny the quality of the knowledge that is produced in this field. This could be done through a closer investigation of the epistemologies embedded in *comparative and global policy studies on adult education*.

Comparative and Global Policy Studies: An Intelligible Body of Work

Policy studies on adult education often assume the nation state as the main unit of analysis, and adopt a top-down approach, for instance, to assess the implementation of a governmental policy at systemic or institutional levels (e.g. in adult education, higher education and so on) and/or in a given territory (e.g. a city, a county). Accordingly, many *comparative* policy studies deal with country-to-country comparisons so to capture and explain similarities and differences in national policy developments and implementations. At times cross-country investigations do not study policy as such, but rather provide governments with comparative statistical evidence to support their policy reforms. This is the case, for instance, with large-scale surveys under the aegis of intergovernmental organisations on adults' participation in education, training and other learning opportunities, like the Adult Education Survey (AES) or that assess the skills adults possess, such as the Programme for International Assessment of Adult Skills (PIAAC) (Schleicher 2008) (see also the chapters by Adley; Boyadjieva and Ilieva-Trichkova; and Rubenson, in this volume).

For this reason, the academic literature distinguishes between research *of* policy (under which falls the type of policy assessment studies referred earlier) and research *for* policy (that embraces the latterly mentioned cross-country, large-scale surveys) (Desjardins and Rubenson 2009). Within this distinction, comparative studies *of* and *for* policy share a conception of polity (or the context for a policy) that is territorially bound. Each country under consideration is

treated as a unique and geographically bounded polity that results from stable relations among political administrative institutions, societal processes, and cultural adherence to certain rules, beliefs, etc.

This chapter centres attention to research *of* policy where, since the mid-1990s, there has been also a flourishing of studies on adult education dealing with policy developments at continental and global scales, and the relations these developments hold with transformations in national policy (see among others Desjardins and Rubenson 2009; Nesbit and Welton 2013; Milana and Holford 2014; Milana and Nesbit 2015). From this perspective, intergovernmental organisations concerned with adults and young school-leavers make a conscious effort to legitimise specific political interests, set the agenda regarding what the purpose and content of learning should be, and influence public and private policies and provision. Yet such efforts happen in combination with the liberalisation of the education market (Marginson 1997), which cautions against ascribing a new educational order to global politics only.

Thus a number of recent studies have analysed the efforts of intergovernmental organisations to legitimise specific political interests and shape international agendas for the education and learning of adults (Milana 2013; Panitsides 2015; Rubenson 2015) through the adoption of new governance mechanisms (Ioannidou 2007; Jacobi 2009) and the promotion of a monitoring culture (Tett 2014). These studies typically draw upon broader literature on globalisation, governance and education that emphasises Europeanisation processes (Lawn and Grek 2012) and 'governance by comparison' (Martens and Niemann 2010) among other governance mechanisms.

Both the comparative investigations of policy, and the research that centres attention on policy developments at continental and global scales, as well as their relation to national developments, I argue, represent a fairly intelligible—though not necessarily cohesive, body of work that shares three characteristics: (1) an interest on political decisions that affects the education and learning of adults; (2) an understanding that the demand and supply of adult education is not independent from public policy; and (3) a consideration for multiple organised communities and particular systems of government as bringing about transformations in adult education provision.

It is such body of work that I address in this chapter as *comparative and global policy studies on adult education.*

Methodological Considerations

Education policy studies, as Mainardes and Tello (2016) suggest, incorporate at least three logical components: (1) an epistemological perspective, or the theoretical perspective the researcher applies; (2) an epistemological positioning that allows its application in a way that is coherent with the researcher's political positioning; and (3) an epistemological outlook, or methodological apparatus that is consistent with both the perspective adopted and the research's positioning. Accordingly, a meta-investigation of education policy studies, the

authors propose, may focus on the levels of abstraction in the knowledge they produce. These move from the lower level of abstraction (i.e. description), where the researcher is mostly preoccupied with presenting the data, not so much with making sense of them, through the middle level of abstraction (i.e. analysis), where sense-making turns central for the researcher but the epistemological perspective, positioning and outlook are unclear and/or lack coherence; towards the highest level of abstract (i.e. comprehension), where both theoretical and analytical density allow for more assertive and insightful interpretations and explanations (Mainardes and Tello 2016). Yet, when applied to the meta-investigation of comparative and global policy studies on adult education, this proposal presents two blind spots. On the one hand, in comparative and global policy studies the identification of the units of analysis is a crucial element for the epistemological outlook to be consistent with the epistemological perspective and the research's positioning. A unit of analysis, in fact, represents the chief entity that is subject to analysis in a given study, and more than a unit of analysis may be considered at different stages of the study. But in most studies that assume a comparative perspective, diverse units of analysis are often combined, hence leading to multilevel analysis (see Bray and Thomas 1995). On the other hand, in both comparative and global policy studies what moves the researcher in carrying out an investigation (i.e. the aim of the research) is highly dependent on the theoretical perspective s/he applies as much as on her/his political positioning.

For the above reasons, the main questions that guided this work were:

Q1. What are the main units of analysis, either explicit or implicit, in comparative and global policy studies on adult education?
Q2. What do these studies aim at?
Q3. Is it possible to identify (and distinguish between) one or more research patterns?

Answering these questions is a pre-condition or indispensable step to move in the direction of a meta-investigation of the epistemologies embedded in comparative and global policy studies on adult education.

The body of work for this meta-investigation is made up of 58 academic texts, for the most articles that appeared in peer-reviewed journals and, to a lower extent, books and book chapters published over the period 2000–2015. First, I gathered a number of texts I was already familiar with, and then complemented this initial set through systematic searches in libraries and online databases. The main database consulted is ERIC (Education Resources Information Center), an online library of education research and information, sponsored by the Institute of Education Sciences (IES) of the US Department of Education. Here, I restricted my search by education age and levels (i.e. adult basic education, adult education, post-secondary education). Further, I used the internal search engines of selected journals specialising in adult education

and/or comparative education (i.e. Adult Education Quarterly, International Journal of Lifelong Education, International Review of Education, Comparative Education). Overall, several combinations of key words were used, depending on the database consulted. These include: adult AND policy; adult AND comparative; (journal title) AND comparative, (journal title) AND policy, (journal title) AND UNESCO, (journal title) AND OECD, (journal title) AND EU), (journal title) AND World Bank. A quick abstract screening run at search stage led to the identification of approximately 200 texts, but a second attentive reading of all abstracts, and selected full texts, led to the final selection herein considered. So, for instance, texts dealing with adult education policy in a given country that did not adopt a comparative perspective nor connected to the work of intergovernmental organisations were not included in the final set.

For the meta-investigation, I employed an inductive analytic strategy that helped synthesise the data so to generate inductive inferences (Polkinghorne 1983) that were 'grounded in data and not speculative or abstract' (Schwandt 2001: 125). Specifically, I first engaged in a close reading of each of the texts under consideration and grouped them according to the similarities I observed in terms of units of analysis; in doing so, I relied on my knowledge and understanding of the central unit of analysis for much comparative education research, partly presented also in Bray et al. (2014). Then, I reviewed the aim of each of the studies under scrutiny, and in the light of this regrouped the texts in new ways that would preserve group distinctive features in terms of unit of analysis, while reflecting also a similitude in scope. At this stage I draw also on my knowledge of, and familiarity with, the broader literature on education policy studies to finally categorise identifiable patterns in these studies' recent evolution.

Overall, the meta-investigation led to the identification of four distinctive research patterns (Q3), each based on a combination of a preferable unit of analysis (Q1) and specific research aims (Q2), as depicted in Table 1. Each pattern is presented in greater details in the sections that follow, and documented through direct references to the literature considered. Due to space constraints, however, I make only reference to texts that exemplify the kind of research characteristic of each pattern, while illustrating also the breath of topics covered within and across patterns. The overall distribution of the whole set of texts examined by research patterns is presented in Fig. 1.

Pattern 1: Describing Changes and Evolutions Along a Temporal Continuum

The studies grouped under this pattern assume *time* as the primary unit of analysis, and represent 20% of the total number of studies under consideration. Yet time is not a univocal conception.

Table 1 Identified research patterns, by unit of analysis and research aims

Pattern	*1 Diachronic/Historical accounts*	*2 Horizontal comparisons*	*3 Vertical juxtapositions*	*4 Counter-argumentative*
Unit of analysis	Time	Space	System	(Political beliefs)[a]
Research aims	Comprehend, explain and critique changes in ideologies	Comprehend, explain and critique differences at local, national or international scales	Unpack the dynamic elements of specific systems of governance, and investigate their effects on other systems of governance	Provide counter-evidence to a political belief to problematise the social imaginary it produces

[a] Most academic work that falls under this pattern is not empirical in nature; hence no core unit of analysis could be identified. But political beliefs when not a unit of analysis still represent the background or justification for all works falling under this pattern

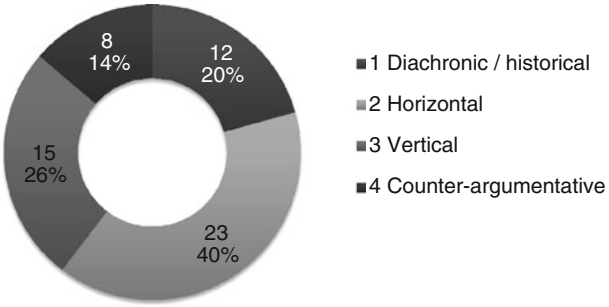

Fig. 1 Distribution of academic texts (number, %), by research pattern

> In using time as a unit of comparison, it becomes immediately obvious that there are several 'types' to consider. These include (but are not confined to) astronomical time, biological time, geological time, and the two most significant types […]: personal time and historical time. (Sweeting 2014: 168)

At macro-level, though not unproblematic, comparing two or more times in education (in terms of events, ideas, attitudes, etc.), in one or more places, assists the study of continuity, change and/or development (Cowen 2002; Nóvoa and Yaruv-Marshal 2003; Sweeting 2014).

The main aim of policy studies that use time as their chief unit of analysis is to comprehend, explain and critique changes occurred in political ideologies that brought about perceptible shifts in discourses on and around the education and learning of adults. For the most part, in fact, shifts in discourses depict evolutions (and to some extent involutions) at ideational level that stimulate

alterations, from soft to drastic, at normative, administrative and financial levels. All of which redefines the boundaries of how adult education and learning opportunities concretise, who is responsible for these arrangements, who will benefit from them, and to what end.

Several historical accounts are found in the literature that depicts the evolutions in the thinking about the education and learning of adults by the so-called 'big actors' (Jacobi 2009) in education governance, like the World Bank, UNESCO, the OECD and the EU. These diachronic studies usually depart from the identification of a value-laden policy concept like 'lifelong learning', and go back in history to depict how such concept has been differently signified over time. Sometimes the authors clarify the interpretative methodology adopted (e.g. critical discourse analysis), as well as the body of documents under consideration, and how these have been selected, yet in the majority of these studies the methodology employed to (critically) interpret conceptual policy evolutions remains at its best unclear, and is at times dubious.

Despite such pitfalls, as a whole this body of literature has brought to light conceptual and policy changes in the way of thinking about the education and learning of adults and the embedded tensions between what in large brush strokes can be termed education for productivity and education for personal development (Holford and MohorčičŠpolar 2012).

For most diachronic, historical analytic studies the comparative perspective is central and concretises in contrasting perspectives by different intergovernmental organisations (see Moosung and Shanzia in this volume) or national governments, yet rarely, if at all, these studies perform 'intra-national' comparisons (Croxford and Raffe 2014).

Although not comparing intra-national education systems, as by Croxford and Raffe's (2014) suggestion, an example that still moves in this direction is Milana and McBain's (2014) critical analysis of US national policy developments. Here, the authors compare intra-national conservative vs. liberal party-sponsored ideologies to comprehend the failure by the US Congress to reauthorise expenditure of federal funds in support of adult education at state level for more than a decade (2003–2014), and despite various attempts being made along this period by diverse Republican as well as Democratic members of Congress. By recognition that party-elected Congressmen reinforce 'polarization of conventional conservative or liberal constellations of concepts when involved, under real-time conditions, in revisiting the national legislative framework for adult education' (Ibid.: 37), the authors appraised both party's sponsored proposals, together with Democrat and Republican political platforms, then juxtaposed the results to tease out across-parties convergent/divergent ideas about adult education. As a result, they demonstrate that party-sponsored proposals have essentially converged towards the provision of English-language instruction and citizenship education for immigrants, although differently signified by Republican vs. Democrat ideologies. Yet they conclude that:

> Party-specific views on adult education, however, also diverge on more subtle yet important matters that partly explains the long-term Congressional inability to reach bipartisan consensus, like the share of responsibilities between central and local governments, parents' positioning in relation to children's school choice, migrant access to adult education provisions, and the contribution to adult education by faith-based and for-profit organizations. (Ibid.: 45)

At times the comparative perspective in diachronic, historical analytic studies remains in the background, for instance, when a study does not contrast states or regions within federal or regional state systems like the US in North America or Germany in Europe, but rather juxtaposes governmental powers, ideologies or actions by national and sub-national regional or local governments, in these studies comparative analysis occurs along a vertical, rather than horizontal, axis.

An illustrative example is Branchadell's (2015) analysis of language education policy in Catalonia aimed at explaining their implications for the learning of adult migrants. Catalonia's political autonomy from Spain has been overtly contested overtime, and its current status as an autonomous region with own language has made it gain the status of a 'minority nation' (Zapata-Barrero 2009) or 'sub-state minority' (Aubarell et al. 2004). Thus it is by contrasting immigration policies and plans by the central and the regional governments that Branchadell argues for a shift in the elitist ideology that has reconceptualised Catalan as 'a supposedly neutral hegemonic language associated with the public sphere' (Ibid.: 85). Accordingly, Catalan language course for adult immigrants are now meant to allow 'all residents, regardless of origin, […] [to] communicate among themselves' (Ibid.: 91).

In a similar vein, but looking at the US, Spruck Wrigley (2015) investigates language policy that set English literacy requirements for immigrants to acquire the Green Card and obtain US citizenship. Through a critical historical reconstruction of federal immigration policy developments, and of evolutions in English as Second Language Service policy, the study contrasts the limited binding power of these policies outside the federal government and those agencies receiving federal funds, with state and urban policies across the country. Consequently, Spruck Wrigley addresses the contradictions and existing 'tension between a federal government that has never declared English as the nation's official language and individual states eager to promote an English Only ideology in their jurisdiction' (Ibid.: 226). This way, the author discusses and explains their effects on the learning of English as Second Language for different groups, including adult migrants that, when undocumented, may be banned access to the public adult education system.

In short, pattern 1 includes diachronic, historical analysis that concentrates on *time* as their crucial unit of analysis so to capture policy continuity, change and/or development that affects the education and learning of adults. The studies included in this research pattern have given primary attention to policy evolutions (or involutions) within intergovernmental organisations, hence helped in increasing our understandings of external factors that impinge on

normative, administrative and financial alterations in the provision of education and learning opportunities for adults in different localities. At the same time, the studies included under this pattern have paid only a limited attention to internal factors such as within country power relations and other internal dynamics that also affect such provision.

Pattern 2: Comparing (Horizontally) Policies by Different Actors, Either at a Certain Point in Time or from a Historical Perspective

Horizontal studies included under this pattern adopt *space* as the primary unit of analysis and represent 40% of the total dataset under consideration. Likewise time, space itself is a non-univocal conception. More traditional comparative analysis equates space to place (Manzon 2014), a geographical/locational dimension (Bray and Thomas 1995) that encompasses from geographical areas (e.g. world regions, continents or countries), to any of their political-administrative sections (e.g. states, provinces or districts), but also smaller territories within (e.g. educational institutions or even classrooms). Despite this, a 'spatial turn' (Warf and Arias 2009) in the humanities has contributed to reconsidering how education policy researchers construe space 'not only as geographical, but as ideological, socially constructed and subjective' (Jokila et al. 2015: 18). This has brought to the fore that norms and ideas (including those that impinge on education policy), which have been conventionally associated with geographical territories, are the result of culture (or the process of meaning making) that occurs in diverse localities through people's interactions with others, as well as with material objects. Accordingly, even if locally produced, culture (and by extension those norms and ideas that govern education policy) has always a potential for being global (Anderson-Levitt 2012). Further, material objects are no longer considered as the simple carrier of meanings but as what can also prompt people into action (Latour 2005); hence, they are the product as much as the co-producers of culture. The main consequence of all this has been a redefinition of the horizon for comparative and policy research beyond geographical definitions of space to acknowledge, among others, the centrality of both people and material objects in the making of policy, but also the complexity of the global—local nexus in education policy developments, including the leverage of key political actors, like intergovernmental organisations, and of material objects that contribute to educational change.

The principal aim of policy studies that adopt space as their chief unit of analysis is thus double-handed. On the one hand, these studies aspire to comprehend, explain, and critique similarities and differences observed in policy discourses, agendas and actions across geographical and/or geopolitical territories at local, national or international scales. On the other hand, they purposely use geographical and/or geopolitical lenses with the aim of focusing attention on, and debating, the complexity of national or international policy

and their practical implications for the education and learning of adults. So, for instance, Storan (2010) adopts the concept of regionalism, 'a political ideology that focuses on the interests of a particular region or group of regions' (Ibid.: 307), to unpack the intricacy of the UK policy on widening participation in higher education. Thus, the author briefly compares a few selected UK's regions (i.e. North East, South West, East of England, West Midlands) to debate the implications that nation-wide policy has for the actual planning, funding and delivery of educational opportunities aimed at outreaching under-represented groups in higher education, including mature adults. Yet, the author does so with the explicit agenda to argue in favour of so-called learning communities and regions (Longworth 2006).

More broadly, an ever-growing number of investigations deliberately focus attention on political actors, usually intergovernmental organisations but also non-governmental bodies, with a continental or global reach, as their secondary unit of analysis, and examine changes in the governance of adult education and learning, assess the working of specific policy tools, and debate the implications all this has (or may have) for adult education and learning practices.

For the most, actor-centred analysis addresses the evolutions in the way of thinking about adult education and lifelong learning within an organisation like the European Union (Moosung et al. 2008; Panitsides 2015), the OECD (Rubenson 2015), UNESCO (Németh 2015), the World Bank (Easton and Samples 2015), including non-governmental organisations such as the International Council for Adult Education (ICAE) (Tuckett 2015). Yet, actor-centred studies may also juxtapose the views of different organisations, embedded in their key policy documents, to pinpoint at whether these organisations' views converge or diverge, and on which terms (Borg and Mayo 2005; Milana 2012; see also Moosung and Shanzia in this volume).

But the secondary unit of analysis rather than political actors can be also found in specific programmes and/or international implementation plans to which national governments subscribe—programmes and plans that are coordinated at continental or global scales under the aegis of intergovernmental organisations, yet implemented by public–private partnerships. Exemplary here is Education for All (EFA), a declaration that, adopted by UNESCO in Jomtien (1990), and reaffirmed in Dakar (2000), has turned into major implementation plans covering up to 2015 and beyond (e.g. The 2030 Agenda for Sustainable Development).

Goldstein (2006), for instance, focuses attention on two of the educational standards set by EFA for 2015: free and complete access to good quality primary education, and most importantly for our analysis, improvements in the level of adult literacy by 50%; in a critical exploration of these learning targets, the author draws on what were at that time the most recent evidence on the measurement of adult literacy at international level: the International Adult Literacy Survey (IALS). Specifically, the author teases out a few concerns with the way adult literacy had been measured, how the results of such measurements had been scored, and the way such scores had been used to construe

adult literacy levels. Measurements embed translation and cultural specificity biases, psychometric scoring techniques tend towards exclusion of testing items that do not fit the underlying assumptions about the very object of measurement, while the score levels that result from this psychometric exercise are just one among equally valid ways to capture progress in literacy skills and their usability (see also Blum et al. 2001). Finally, by contrasting the impact that similar learning targets have had on educational systems in both the UK and the US, Goldstein argues that 'an emphasis on numerical learning targets can be dysfunctional', thus 'any rise in test scores should not be confused with a rise in learning achievements as opposed to test-taking performance' (Ibid.: 124).

In a nutshell, pattern 2 includes horizontal studies that assume *space* as their main unit of analysis so to better comprehend the complexity of global governance in adult education, and the interplay between local–global dynamics. By generally opting to centre attention on identifiable organisations that, being intergovernmental or non-governmental in nature, have a global or continental reach, the studies in this research pattern complements the knowledge produced by those studies describing changes and evolutions along a temporal continuum (cf. Pattern 1). Nonetheless, similar to diachronic studies, the studies under this research pattern have overlooked the potentials for deeper investigations of internal dynamics, such as within-country power relations between federal states, regions, suburbs, cities or towns, and neighbourhoods (as relevant by country).

Pattern 3: Juxtaposing (Vertically) Policies by Intergovernmental Organisations with Those of Their Member States, and Assessing Convergence/Divergence

Vertical studies comprised under this research pattern represent 26% of the total dataset and use *system* as their primary unit of analysis. A system makes reference to a number of things that are connected in dynamic ways to form a complex whole, thus in educational research the term is often used to address national education systems or any of their subdivisions (e.g. the vocational education and training system, the higher education system, the adult education system and so on). However, in a broader sense, a system can be defined as

> any recognisably delimited aggregate of dynamic elements that are in some way interconnected and interdependent and that continue to operate according to certain laws and in such a way as to produce some characteristic total effect. A system, in other words, is something that is concerned with some kind of activity and preserves a kind of integration and unity; and a particular system can be recognised as distinct from other systems to which, however, it may be dynamically related. (Allport 1955: 469)

As such, different systems are made the object of investigation in the literature that employs a vertical analytical axis, like specific systems of governance at global scale (e.g. the UNESCO worldwide systems) or at continental one (e.g. the European system), and the complex mechanisms such systems stimulate for implementation and adoption within national systems of governance.

The aim of policy studies that use system as their chief unit of analysis is to unpack the dynamic elements that compose specific systems of governance, and investigate their effects on other systems of governance. For the most part, such studies recognise that documents produced by intergovernmental organisations, activities these organisations coordinate (e.g. international conferences) or requests and inputs they address to member states are not isolated, but rather dynamic elements that contribute to the global governance of adult education (Milana 2015). As such, documents, activities, requests and inputs by intergovernmental organisations connect various adult education systems around the world that would otherwise be independent from each other, and this not only at ideational level, but also in concrete terms.

Several studies take a point of departure in a political notion that was introduced and/or sustained by the OECD or the European Union, among others, and investigate how such notion concretises within specific national contexts, more often than not by juxtaposing two or more national systems.

For instance, Plant and Turner (2005) centre attention on the notion of workplace guidance advanced by the European Union and even more so by the OECD as 'a mainly remedial activity targeting the unemployed, yet some initiative involves a more proactive approach' (Ibid.: 126). Then, the authors dig into the reasons for this notion to have turned into an important feature of the UK and the Danish contexts, where schemes for workplace guidance have been introduced and implemented by the social parties to support access to further learning opportunities amongst employees. By presenting and juxtaposing such schemes and their characteristics, the authors conclude that both countries had pioneered contrasting approaches to workplace guidance that had been successful, yet they also point at the relevance of dedicated resources and legal frameworks for workplace guidance to be sustained over time.

In a similar vein, Pohl and Walther (2007) have dissected the notion of activation of disadvantaged groups, as it emerges from policy developments within the European Union. However, through secondary analysis of statistical data complemented by focus groups discussions, the authors deepened their knowledge on the different activation models in place across European member states. Such knowledge allows a discussion on differential relationships between specific transition regimes in place in Europe and, for each of these regimes, 'whether activation implies adaptation to mechanisms of selection in education, training and the labour market, or whether it increases young people's potential to take action in shaping their own biographies (i.e. through participation and lifelong learning)' (Ibid.: 533).

Additional political notions that have captured the researchers' attention include, yet are not limited to, the validation of non-formal and informal learning (Cavaco et al. 2014), the accessibility to learning opportunities (Papastamatis and Panitsidou 2009) and so on.

A few other studies originate from policy-relevant events that attract global attention and traces back and forth their impact in specific geographical and/or geopolitical territories at either national or continental scales. The most recent international conference on adult education (CONFINTEA VI) held in 2009 under the coordination of UNESCO, and hosted by the Brazilian government, is exemplary of an event that has been the object of several investigations. One such study, by Rubenson and Nesbit (2011), looked closely at the process of producing a national report for Canada, in preparation to the CONFINTEA VI, upon the UNESCO's request. The authors first reviewed how the production process played out in their national context, then juxtaposed the results (i.e. the actual report) with that of a few other countries that, like Canada, showcase upper to high participation rates in adult education (i.e. Finland, Sweden and the UK).This way the authors brought to light that 'as a mechanism for encouraging a national debate, the process [leading to the production of the national report in Canada] fell far short of what it might have achieved or indeed of the consultative processes adopted for several earlier CONFINTEA conferences' (Ibid.: 137). Further, by juxtaposing its end product with that of other countries, the authors brought additional light on the manifest policy ambitions, supply of learning opportunities, and financial policy levers for adult education at the time the Canadian report was produced.

In essence, pattern 3 comprises vertical comparisons and intergovernmental organisations–member state analysis that adopt a *system* as their principal unit of analysis. Sometimes these studies focus attention on the elements that compose an identifiable system of governance at global or continental scales, others on any of the governance mechanisms arousing from such system. Further attention is paid on the ways the elements that compose an identifiable system of governance, and specific governance mechanisms, interact to produce perceivable changes in the education and learning of adults. As such the studies under this research pattern have contributed new knowledge on the rise (and fall) of political notions and their concretisations in terms of new educational models, services or provisions. Moreover, they have contributed to our understandings of the impact that global policy-relevant events have had or may have at either national or continental scales. Yet, the studies under this pattern have not yet explored the potentials of 'reverted' vertical comparisons that, departing from member states, may illuminate whether and if so to what extent local and national systems of governance may influence the working of more complex systems, or exploit policy-relevant events with a global reach for internal political gains, etc.

Pattern 4: Questioning and Providing Counter-Evidence for Widespread Political Beliefs

Alongside the three above-mentioned research patterns, a fourth was identified to collate all those contributions for which it was not possible to identify a primary unit of analysis, as I will explain shortly. Yet this body of work, which represents 14% of the total work under consideration, shares an attention to widespread political beliefs and cultural hegemonic principles surrounding policy developments in adult education.

A belief is the acceptance that something is true or in existence, even without evidence. By extension a political belief that explains how society works represents a blueprint for political action. Further, when able to direct the mind and the symbolic elaboration of the citizenry's language and lifestyle by those in power, a political belief may turn into a cultural hegemonic principle persuading citizens to adhere to a particular political project (Gramsci 1975), in so doing, it produces a new social imaginary—'what enables, through making sense of, the practices of a society' (Taylor 2012: 91), about the education and learning of adults.

The aim of these contributions is to provide counter-evidence to a political belief concerned with the education and learning of adults, hence to problematise the social imaginary it produces as the only way of making sense of society and its practices. Yet, two clarifications are needed here. First, I use the term *evidence* literally to indicate 'the available body of facts or information indicating whether a belief or proposition is true or valid' (Oxford Dictionaries Online, n.p.), which does not necessarily reduce facts or information to available statistical data. Second, I purposely speak of contributions rather than policy studies or investigations as most of them may be catalogued as think pieces or discussion papers instead; in other words, these do not derive from empirical work, but are rather speculative critiques or analyses of the conceptual basis on which a political belief is grounded.

A political belief that has attracted research attention in recent years is that the promotion of lifelong learning through relevant educational actions will contrast the effects of the 2008 global financial crisis. Problematising this political belief, for instance, Ahmed (2010) explores the economic dimensions of sustainable development, existing evidence on the effectiveness of the global fight against poverty, and what have been and could be educational responses; in so doing, the author argues that at the mid-decade global review on the Unite Nations Decade of Education for Sustainable Development, held in Bonn in 2009, the debate had 'underscored that […] transforming economic systems in order to promote sustainability requires that the education systems also be transformed, and vice versa' (Ibid.: 252).

Another widespread political belief is that lifelong learning, including the education and learning of adults, promotes the development of countries, independently from their geopolitical positioning in the world system. Problematising this belief are primarily researchers living and working in the

global South. Exemplary in this case is a contribution by Preece (2009) that adopts a postcolonial perspective and uses evidence from Africa to question dominant, Northerly-set learning priorities for the South that, as the author argue, reduce lifelong learning (and adult education) to the provision of basic education from childhood to adulthood.

Further contributions problematise widespread political beliefs through thick, qualitative investigations in areas in which there is still limited evidence despite these being among policy priorities at national, continental and global scales. One instance of this type of contributions is the phenomenological study by de Greef et al. (2012) on the social inclusion of vulnerable adults. With a point of departure in the shared concern by the EU and the OECD for vulnerable adults in lack of basic competencies and thus at risk of social exclusion, based on available literature, the authors first defined social inclusion as an interactive, multidimensional process that incorporates four dimensions: (1) activation—'the functional outcome for the individual'; (2) internalisation—'the increase of emotional satisfaction for the individual him- or herself'; (3) participation—'a growing functionality of an individual in connection with his or her environment'; and (4) connection—'having more or better contact with others' (Ibid.: 457). Then de Greef and colleagues applied this conceptual model to explore the life experiences of more than 30 vulnerable adults who had participated in adult education programmes to conclude that 'increase on an individual level (activation and internalisation) is more often perceived by the interviewees than an increase on the collective components of social inclusion (participation and connection)' (Ibid.: 471–472), but highlight also that, contrary to other studies, they found that the teacher's support was an important factor for all interviewees.

Last but not least, problematising widespread political beliefs are also a number of critical overviews of adult education in neoliberal times. For the most these contributions assess the impact of neoliberal policy at national or systemic levels in two or more countries, at times also paying attention on the implications it has for adult educators (Bowl 2014).

Summing up, pattern 4 collates a number of contributions that, either reporting on a policy study or investigation or pulling together different types of evidence found in the literature, aim at problematising widespread political beliefs concerned with the education and learning of adults. While this work does not necessarily complement our understandings of what redefines the boundaries of adult education and learning provision (cf. Pattern 1), nor similarities and differences in policy discourses, agendas and actions across geographical and/or geopolitical territories (cf. Pattern 2) or even the dynamic elements that compose specific systems of governance, and their effects on other systems (cf. Pattern 3), this body of work helps nonetheless to preserve a space for subverting the viewpoints on adult education policy, by provoking new questions that are worth attention by those researching comparative and global policy on adult education.

Conclusion

Summing up, this chapter argues that under the research *of* policy, *comparative and global policy studies on adult education* represents a growing intelligible body of work in its own right. Whether this is on the fringe of or one among the latest developments of International Comparative Adult Education Research (Field et al. 2016) is open to debate.

Further, through a meta-investigation of selected texts, this chapter also brought to light that when we question what the main units of analysis *comparative and global policy studies on adult education* adopt, and to what scope these studies are made, it is possible to identify at the least four distinctive research patterns. Each of these patterns presents its own strengths and limitations in terms of the *type* of knowledge it produces, hence all of them are worth further nurturing and using in a complementary manner.

But what is even more important for future research in this field to grow and flourish is to deepen our understandings of the quality of the knowledge it produces. This could be done through further meta-investigations that look specifically at the epistemologies these studies embed (Mainardes and Tello 2016).

Further studies could, for instance, tease out the epistemological or theoretical perspectives embedded within and between research patterns, as well as the different positioning that researchers assume, and whether these are coherent with the application of unambiguous epistemologies and theoretical perspectives both within and also across the patterns. Equally important is to question what methodological apparatuses are put in place by policy researchers dealing with the comparative and global dimensions of adult education policy, and whether these are coherent with the researcher's epistemology and positioning.

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