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**LIFELONG LEARNING
AS AN EMANCIPATING PROCESS:
A CAPABILITY APPROACH**

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Abstract

The chapter offers a theoretical outline of the heuristic potential of the capability approach in conceptualizing of lifelong learning and tests the capacity of this approach to guide empirical studies on lifelong learning. It argues that the capability approach provides a theoretical framework for the understanding of lifelong learning as an agency process which is embedded in different social and institutional contexts, for grasping its different meanings for individuals and society and for its critical evaluation against the background of important values, such as justice, freedom and identity development. Drawing on data from the Adult Education Survey (2007), the chapter suggests an index of fairness in participation in adult education and explores various meanings of adult education and obstacles to participation in it.

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Introduction

‘Lifelong learning’ is certainly one of the most fashionable concepts nowadays. Recently it has become a slogan and an ‘incantation formula’ of European policies, especially those related to employment. However, during the last two decades, the rising policy importance of lifelong learning has been accompanied by two other processes. On the one hand, academic circles are becoming more critical of the concept. The emphasis of their criticism is both on the epistemological status of the concept itself of ‘lifelong learning’ and the goals and functions of lifelong learning policies and practices. The concept of ‘lifelong learning’ has been criticized a lot as being vague and potentially serving too great a variety of political objectives (Smith 1996, 2001), as a “chameleonic concept” (Grace 2004, p. 385), as “bungee jumping” (Boshier 2001, p. 361), as a “catch-all concept, a problematic umbrella descriptor for all and sundry kinds of formal, non-formal and informal learning” (Grace 2004, p. 389) and even as a Goliath-term (Duke 2001, p. 503). With regard to its results, critics have labelled lifelong learning as part of the hegemonic neo-liberal project, for which all that matters is the economy and the market (Borg & Mayo 2004, 2005; Crowther 2004; Preston 1999) and as a form of social control and a mechanism promoting the marginalization of the excluded and reasserting the social-reproductive functions of education (Crowther 2004; Field 2001; Jarvis 2001; Preston 1999).

On the other hand, different analyses and surveys’ data have shown that lifelong learning is not an unproblematic value, and that its practical implementation faces different challenges. Studies reveal that educational advantages have a cumulative character. It is emphasized that the advantages (or disadvantages) in early adulthood continue to influence lifelong learning capability throughout life (Yaqub 2008; Walker 2012). As a result, the higher the education a person has, the higher the probability to engage in lifelong learning.

Data also show that there are big differences across countries in participation in lifelong learning. In some countries, such as Bulgaria and Romania, the participation rate in lifelong learning for 2014 among people aged 25–64 was below 2 percent, whereas this rate in Denmark and Switzerland is higher than 30 percent (Eurostat 2015). These statistics point to the importance of the context/structure and the diversity of settings in which people can make choices regarding lifelong learning and can participate in educational activities. In such a situation, fresh theoretical frameworks are needed to provide new perspectives for discussing and capturing the essence of lifelong learning and its missions and values.

Authors use different terminology and suggest different understandings of the concepts in the sphere of lifelong learning (Jarvis 2010; Holford, Milana & Špolar 2014, Blossfeld, Kilpi-Jakonen, Vono de Vilhena & Buchholz 2014). Lifelong learning includes different kinds of knowledge and skills (institutionalized and informal, organized and sporadic, purposeful and unintended) within different perspectives (personal and social; employment and citizenship; leisure and work). We view adult education and adult learning as the most important forms of lifelong learning.

Against this background, the aim of this chapter is twofold. First, to theoretically outline the heuristic potential of the capability approach in conceptualising and understanding lifelong learning. Second, to test the capacity of this approach to guide empirical studies on lifelong learning and to propose an index of fairness in participation in adult education. We argue that the capability approach provides a theoretical framework for: a) understanding of lifelong learning as a personality-driven and agency process; b) grasping different meanings of lifelong learning for individuals and society (both intrinsic and instrumental); c) revealing how lifelong learning as a practice is embedded in different social and institutional contexts and how these contexts frame lifelong learning activities and learners' experiences; d) critical evaluation of lifelong learning policies and results obtained against the background of

important personal and social values, such as freedom, agency and identity development, justice and well-being (which are not restricted to economic achievements).

The study proceeds as follows. First, we give an overview of the capability approach and studies that apply this theoretical framework in the sphere of education. Then, we discuss how lifelong learning may be conceptualized via the capability approach perspective. This is followed by an empirical analysis of adult education based on data from the Adult Education Survey (2007) which are interpreted via the capability approach lens. The final part of the chapter raises the question whether lifelong learning is an emancipating force or a form of social control.

The capability approach and studies on education

Brief overview of the capability approach

The capability approach is associated mainly with the work of the Nobel Prize-winning economist Amartya Sen, and the political philosopher Martha Nussbaum. It is a social justice normative theoretical framework for conceptualising and evaluating phenomena such as inequalities, well-being and human development. According to the capability approach, it is not so much the achieved outcomes (functionings) that matter, but the real opportunities (capabilities) that one has for achieving those outcomes. Sen (1992) argues that a person's capability to achieve functionings that he/she has reason to value provides a general approach to the evaluation of social (including educational) arrangements. For Sen, capabilities are freedoms conceived as real opportunities (Sen 1985, 2002). More specifically, capabilities as freedoms refer to the presence of valuable options, in the sense of opportunities that do not exist only formally or legally but are also effectively available to the agent (Robeyns 2013). Sen pays special attention not only to negative freedom (Sen 1985, pp. 217–220), but to positive freedoms as well – “(the freedom ‘to do this’ or ‘to be that’) that a person has” (Sen

1985, p. 201). These can be various things such as the freedom to be employed, educated, happy, to have shelter and to enjoy a healthy life.

In contrast to Sen, Nussbaum's version of the approach is rather political. She endorses a universal, cross-cultural list of 10 central capabilities (i.e. life, bodily health, bodily integrity, senses, imagination and thought, emotions, practical reason, affiliation, other species, play, control over one's environment), which in her view must provide the basis of constitutional guarantees (See Nussbaum 2011 for more details). Although Sen (1992) also recognises that the concept of freedom is loaded by internal plurality, he stresses that human beings are diverse and is not in favour of limiting the range of capabilities people have. Thus, every person is seen to have a specific capability set, which includes all capabilities they have. Overall, a person's capability set depends on a variety of factors, "including personal characteristics and social arrangements" (Sen 1999, p. 33). In other words, the capability approach acknowledges that different people have different abilities to convert the goods (such as recourses or opportunities) which they have into real achievements. This is taken into account via the so-called 'conversion factors'. Conversion factors refer to a wide range of factors which influence how a person can be, or is, free to convert the characteristics of the good or service into individual functioning. There are three different types of conversion factors: personal, social and environmental conversion factors (Robeyns 2005; Crocker & Robeyns 2009). These factors provide a bridge between diverse individual biographies and social arrangements and underscore the difficulty of focusing solely on the subjective wants of learners, since these might be adapted in ways that do not necessarily serve their best interests (Unterhalter 2009, p. 221). In this sense, an acknowledgement of human diversity and the diversity of settings and, the extent to which they shape the capability space, is an inseparable part of the evaluation of the capabilities of people.

Last but not least, the capability approach is very sensitive to “the importance of the agency aspect” of freedom, which is related “to the view of persons as responsible agents” (Sen 1985, pp. 203–204). As regards education, this framework acknowledges that “having education affects the development and expansion of other capabilities, so that an education capability expands other important human freedoms” (Walker 2012, p. 454). It is very important that the capability approach sets a framework for critical evaluation of current developments in education and the results obtained by paying special attention to personal and social values, such as freedom, agency and personal (identity) development, justice and well-being.

Main studies applying the capability approach to research in education

Currently, there is a huge body of literature that has explored the potential of the capability approach in the evaluation of the learning opportunities, processes and outcomes of education but also for conceptualization, measurement and evaluation of inequalities or social justice in education (for example Biggeri 2007; Brighthouse & Unterhalter 2010; Otto & Ziegler 2006; Ribeiro 2015, Terzi 2007; Saito 2003; Walker 2006, Walker & Unterhalter 2007; Wilson-Strydom 2014). However, there is an internal divergence of this approach which is also one of the reasons why Sen’s and Nussbaum’s versions of the approach are applied in different studies on education. Thus, whereas Sen’s work has been mainly used in general discussions of policy and critiques of theories regarding education and economy, Nussbaum’s work has been of considerable interest because of her concern with the content and process of education (Unterhalter, Vaughan & Walker 2007).

Overall, the studies that explore education via the capability approach lens, up to this moment, focus predominantly either on children’s education or on higher education, as they are mainly concerned with different vulnerable groups such as women, children, young

people, people with disadvantaged socioeconomic background, and people with disabilities. Whereas the majority of studies focus on developing countries in Africa, Latin America or Asia, the capability approach has been applied in developed countries as well. Most of the studies focus on formal education and, in particular, on the role of education for human development and well-being, since it is related with the enhancement of people's capabilities such as literacy, numeracy and empowerment. Expanding capabilities for education can also be related with ensuring better opportunities for people to access education. For example, is there safe public transport to the nearest school or is schooling affordable for all? (See Vaughan & Walker 2012). However, research has also shown that formal education structures may not always entail an enhancement of capabilities and substantive freedom, but can have negative effects on capabilities or diminish them (Flores-Crespo 2007; Unterhalter 2003; Walker & Unterhalter 2007). With some exceptions (for example Walker 2012), less attention has been paid on the non-formal and informal forms of learning and how they influence the capabilities of people or whether people have capabilities to access such forms of learning. Thus, Melanie Walker's study shows that if we look at the current practices and policies in lifelong education via the capability approach lens they can be criticised as narrowly defined, for example, as related mainly to employability of people. She argues that not all versions of lifelong education enhance agency and good lives.

*Multiple roles of education – the capability approach as a way to go beyond
the human capital approach*

The capability approach provides a broader perspective to education in comparison to the human capital perspective. The human capital perspective has served as a general framework for the European policy agenda in the sphere of education in the Lisbon and the Europe 2020 strategies and for the rise of the knowledge-policy discourse. The recently-published report on

adult education in Europe (European Commission/EACEA/Eurydice 2015) is also elaborated mainly within the human capital approach. This perspective is associated with the work of the economists Theodore W. Schultz (1961), Jacob Mincer (1984) and Gary Becker (1993). In his seminal study *Human Capital: A Theoretical and Empirical Analysis with Special Reference to Education*, Becker (2013) perceives education and training as “the most important investments in human capital” (p. 17). This view is based on the assumption that, by providing knowledge and skills, schooling and learning, and training outside schools (e.g. on-the-job training) people’s earnings and their productivity may rise. Another major assumption of this theory is that all human capital is homogeneous, which conflicts with qualitative differences in types of education, on-the-job training, informal learning, etc. The human capital theory advocates an entirely instrumental perspective to education: education loses its intrinsic value as knowledge and as a crucial process for individuals’ identity formation.

The capability approach goes beyond the human capital theory by adopting a much richer vision of human development and acknowledging both the intrinsic and the instrumental roles of education. According to Sen, human capital theory looks at human beings mainly as means of production, while they are also “the end of the exercise” (Sen 1997, p. 1960). Sen emphasises that: “[t]he benefits of education thus exceed its role as human capital in commodity production. The broader human capability perspective would record – and value – these additional roles” (Sen 1997, p. 1959). What is more, the instrumental role of education is narrowly perceived as limited only to economic productivity. In fact, investment in education could lead to other personal and social benefits as well and may be motivated by various reasons that may be not only job-related. Bearing in mind the importance of the human capital theory in emphasising that education is a form of investment in human capital and a key factor for economic growth, and considering the narrowness and inadequacy of its economic, ahistorical and instrumentalistic approach, we share Sen’s view

that “we must go *beyond* the notion of human capital, after acknowledging its relevance and reach. The broadening that is needed is additional and cumulative, rather than being an alternative to the ‘human capital’ perspective” (Sen 1997, pp. 1961).

The notion of capability in Sen’s view implies a larger scope of benefits from education than improving economic production, and includes influencing social change and enhancing well-being and freedom of individuals and peoples. The human capability perspective focuses on the impact that education may have on the expanding of human ability to lead a valuable life and to enhance the substantive choices people have (See Sen 1999, pp. 292–297). Nussbaum (1997, 2006) pays special attention to the role of (liberal) education, arguing that it cultivates humanity by developing three capacities crucial for the health of democracy: the capability for critical self-examination and critical thinking about one’s own culture and traditions; the capacity to see oneself as a human being who is bound to all humans with ties of concern and the capacity for narrative imagination; the ability to empathise with others and to put oneself in another’s place. Furthermore, education is of key importance for the development of all 10 capabilities included in her list. Education also “potentially enables other capabilities” (Walker 2007, p. 178).

The capability approach and social justice in education

In fact, Sen’s and Nussbaum’s versions of the capability approach also differ regarding how social justice may be provided. Whereas Nussbaum’s approach, which offers a partial theory of justice, considers that the state should provide a threshold of 10 essential capabilities, so that it ensures a life worthy of the dignity of each human being, Sen’s account of justice is concerned with how people’s well-being may be improved and they can live in more just societies. Sen insists on the active role of the individual in the diagnosis of injustice and in its removal.

Sen outlines two distinctive traditions of justice. The first approach which aims to identify what perfectly just social arrangements might be and concentrates primarily on getting the institutions right. Sen calls it ‘transcendent institutionalism’. The second approach – realisation-focused comparison – is concerned with “social realizations” resulting from actual institutions, actual behaviour and other influences (Sen 2009, pp. 5–7). According to Simon Marginson (2011) these two understandings of justice resonate in the two perspectives/dimensions in which social equity in higher education has been recently conceptualized: *inclusion* and *fairness*. The inclusion perspective points “to the significance of improvement in participation of any particular group irrespective of how other groups have fared” (Clancy & Goastellec 2007, p. 146). The fairness perspective “implies ensuring that personal and social circumstances – for example gender, socio- economic status or ethnic origin – should not be an obstacle to achieving educational potential” and thus “access to, participation in and outcomes of tertiary education are based only on individuals’ innate ability and study effort” (Santiago et al. 2008, pp. 13–14). Thus, whereas the first approach “focuses on growth in the *absolute number* of people from hitherto under-represented socio-economic groups, as defined in terms of income measures or social or occupational status”, the second one focuses on the *proportional distribution of student places* (or graduations) between different social groups (Marginson 2011, pp. 23–24).

We argue that for explorative and explanatory purposes, both perspectives should be simultaneously taken into account. In so saying, our view is consistent with Patrick Clancy and Gaële Goastellec (2007, p. 146), who emphasise the importance of taking into account “changes both in relative and absolute levels of participation”. This means that we need to answer at least three main questions: *What growth?*, *Access for whom?* and *Access to what?* in order to outline the situation in lifelong learning in a given country. The answer to the first question will show the increase in absolute numbers of people involved in lifelong learning.

The second question will reveal the relative chance of representatives of different social groups to enter different forms and programmes of lifelong learning. The third question refers to the differences in quality and prestige of different providers of lifelong learning and programmes, and thus its answer will show the existence of additional inequalities, caused by the internal differentiation and stratification of lifelong learning systems.

Conceptualizing lifelong learning within the capability approach perspective

Just as mass-scale school education is a response to the needs of early modern societies, so the concepts, practices, and policies of lifelong learning become fully understandable only in the context of late modernity, with its radical individualization of individual life trajectories and unprecedented ‘permeability’ of formerly invincible social boundaries (Boyadjieva et al. 2013). Lifelong learning is a ‘manifestation’ of the interpenetration between education and life and may be defined as “a metaphor that highlights both the fact that education is without boundaries, i.e. that it is not reducible to previously envisaged results or formal instructions, and its post-modern quality, that is its non-systematicity, signifying power and socio-cultural contextuality” (Usher 2001, p. 166). Bearing in mind the ongoing debate about the most proper terminology of lifelong learning or lifelong education (eg. Wain 2001; Tuijnman & Boström 2002; Jarvis 2010; Holford & Milana 2014), we follow Peter Jarvis’s argument that “lifelong education became lifelong learning” (Jarvis 2010, p. 36) and prefer using the term lifelong learning, for three main reasons. First, whereas education refers to provision of learning opportunities in an institutionalized and planned manner, learning is a wider term that could embrace not only formal, but also non-formal and informal forms of learning. Second, by moving the focus from structures and institutions to individuals, it emphasizes the agency aspect of the educational and learning processes and the active role of the individual in

them. Third, lifelong learning pays special attention to the individual, who can make his/her own choice regarding what he/she wants to learn in accordance to what he/she has reason to value. It is of key importance especially when we consider the forms of education after the compulsory one.

The capability approach offers a theoretical framework that could take into account the above-mentioned three main reasons and overcome the main criticism of the concept of lifelong learning, namely that it is a part of the neo-liberal project which considers individuals only as consumers, and takes away the responsibility from society and the state. The capability approach allows to take into account both individuals/agency and society/structures when conceptualizing lifelong learning. It pays special attention to agency and regards each person as a dignified and responsible human being who shapes her or his own life in the light of goals that she/he has reason to value. Understanding of lifelong learning not only as agency achievement but also as an agency process is very important if we want to capture its difference from traditional school education with respect to the positions of the actors involved in it. In lifelong learning, students are subjects of their own action, for their inclusion in education can only occur as a result of their personal decision. Furthermore, the ‘lifelong learning’ may be understood as “a positive process of deepening understanding and reflection in which learning forms our distinctive agency as rich human beings who are economic agents, but much, much more than this” (Walker 2012, p. 190).

Thus, Sen’s understanding of agency (1992, 1999) allows us to outline several new perspectives for research on lifelong learning, focusing on: i) different meanings of lifelong learning: lifelong learning subject as someone who acts purposefully from someone who brings about change; ii) taking into account the possibility that people engaging in lifelong learning can help, not only for improving of their individual well-being but also for other people’s well-being; iii) distinction between agency-enhancing learning from just acquiring

new skills. Within the proposed framework it is also possible to capture a wider range of benefits of lifelong learning for individual and thus to overcome the narrowness of the human capital theory in which human lives are viewed as means to economic gains.

Recently, some authors have suggested that, in order to understand lifelong learning, we have to consider the broader structural and cultural conditions and how past habits and routines are contextualised. Therefore, the agency of people is in fact, and should be understood as, ‘bounded’ (Evans 2007; Rubenson & Desjardins 2009). This concept is important from a life course perspective as it regards an individual’s life events as resulting from the interaction between the broader structural conditions and targeted policy measures, on the one hand, and the individual’s conceptual apparatus, on the other. Thus, it allows us to move “beyond assumptions of standardised models that illuminate only part of human behaviour towards models that take into account and depict the complexities of factors that impact on choices and decision-making through the life course” (Evans et al. 2013, p. 26). The capability approach acknowledges the “deep complementarity between individual agency and social arrangements” (Sen 1999, p. xii). Although the idea of choice is central in the capability approach, the individual is not viewed as a freely-choosing subject but as acting within specific social and institutional arrangements which could function also as social constraints. Thus, the capability approach may be conceived as particularly productive theoretical approach in the context of lifelong learning, through specific consideration of individual agency and its formation and through the interaction of this agency with institutional contexts where people live.

Applying the capability approach, Jean Drèze and Amartya Sen (2002, pp. 38–40) discuss five different ways in which education can be valuable to the freedom of a person: *intrinsic importance, instrumental personal roles, instrumental social roles, instrumental process roles* and *empowerment and distributive roles*. Ingrid Robeyns (2006, pp. 70–71)

proposes a modified version of this typology in accordance with two aspects: economic–non-economic and personal–collective. Although the Robeyns’s typology is more systematically developed, it does not fully recognise two important aspects of the capability approach perspective to education. First, Drèze and Sen emphasise the social dimension, not only of education outcomes, but of the process of improving education as well (Drèze & Sen 2002, p. 41). Second, the non-economic personal instrumental role should not be confined to its role as a *transfer* of knowledge that produces non-economic personal benefits, but should also pay attention to the substantial *transformative power* of education as a factor for identity formation and agency empowerment. We think that this transformative and empowering role is an essential part of education and it should not be understood as a purely instrumental one insofar as it could be fully realised only based on intrinsic knowledge and values.

A conceptual model of lifelong learning roles

Taking into account the above discussions, we develop *a model of roles of lifelong learning* following two lines of reasoning: 1) *level of influence*: individual or societal, and 2) *character of influence*: intrinsic, instrumental and transformative/empowering (See Table 1). The model clearly demonstrates the complex nature and plurality of roles and values of lifelong learning and the heuristic potential of the capability approach for capturing them. At the macro (societal) level, in addition to the widely acknowledged role of lifelong learning for economic and cultural development, we identify the role of lifelong learning for validation of different types of knowledge and legitimization of important social values. At the individual level, we differentiate the roles of lifelong learning related to different aspects of personality development, alongside graduates’ employability, and classify them according to their instrumental, intrinsic or transformative/empowering value. We also take into account the role of lifelong learning for human development in two different perspectives: an instrumental

one, in terms of improvement of the population's knowledge and skills, and an empowering one, in terms of expanding the real freedoms that people enjoy.

Table 1. Model of lifelong learning roles in a capability approach perspective

Level of influence	Individual	Society
Character of influence		
Instrumental	<ul style="list-style-type: none"> • Formation of status identity as a learner • Employability (formation of learners' abilities to find employment by developing relevant knowledge, skills, attitudes, identities) 	<ul style="list-style-type: none"> • Human development (viewed as improvement of human capital) • Promoting economic growth • Diversification of cultural and intellectual centres
Intrinsic	<ul style="list-style-type: none"> • Valuing and acquiring knowledge for its own sake 	<ul style="list-style-type: none"> • Validation of different types of knowledge • Legitimization of values in society: progress, rationality, equity (as both inclusion and fairness), tolerance, freedom of thought, diversity
Transformative/Empowering	<ul style="list-style-type: none"> • Personality development <ul style="list-style-type: none"> - Formation of responsible identity - Development of abilities for independent and critical thinking and imagination - Agency development and empowerment of a person to control his/her environment • Promoting the individual's mobility 	<ul style="list-style-type: none"> • Human development (understood as a process of expanding the real freedoms that people enjoy). • (Re)distributive - facilitating social group mobility and the ability of different groups, disadvantaged included, to organize and express their interests)

We define the above model as an ideal type in the Weberian sense. This means that it is simply a cognitive instrument for capturing and understanding the diversity of missions/roles of lifelong learning and has no ontological reality. Mission/roles of lifelong learning can refer to a national system of lifelong learning, to a European, or to a regional. Thus, missions/roles of lifelong learning are regarded as embedded in different social and organizational contexts. At this stage, our model does not present any specific indicators. It provides a first step that must be followed by a discussion of the most suitable instruments and indicators for assessing how each one of the lifelong learning roles is realized in different social and institutional contexts. For example, we have applied an adapted version of this model for rethinking missions of higher education built upon the capability approach and the institutional perspective (Boyadjieva & Ilieva-Trichkova 2016).

The capability approach lens for empirical studies on adult education

Data

In the second part of the chapter we will try to test the heuristic potential of the capability approach in empirical research on lifelong learning, focusing on adult education. We differentiate between adult education and adult learning. Adult education relates to institutionally-organized forms of education of adults, more concretely – to formal and non-formal adult education and training. Adult learning is a broader concept and includes all learning activities of adults, both institutionalized and informal. The following analysis refers to adult education.

The empirical basis of our study is the Adult Education Survey. The survey covers participation in education and training (formal, non-formal and informal learning) of people aged 25–64 who live in private households. The reference period for the participation in education and training is the twelve months prior to the interview. This survey was conducted,

using random sampling procedure, in two waves – 2007 and 2011. We use the first wave of the survey, and will focus only on formal and non-formal education. Our analysis refers to the 26 countries for which data on the followed measures were available. More specifically, drawing on these data, and following a mainly macro-level approach, we will use different measures calculated separately for each country and discussed via the capability approach lens with the aim to: i) capture both aspects of justice in the participation in adult education (inclusion and fairness), ii) explore the various meanings of adult education, and iii) differentiate the obstacles for participation in different forms of adult education.

Inclusion and fairness in participation in adult education

As already discussed in the first part of the chapter, the capability approach allows us to conceptualise social justice in lifelong learning by differentiating two different aspects of participation in adult education: *fairness* and *inclusion*. Thus, we can capture not only the growth in the *absolute number* of people engaged in adult education, but also the *proportional distribution* of different social groups in adult education activities. More specifically, *we define fairness in adult education as related to the diversity of the student population. That is, the idea that the student body entering, participating in and completing different adult education activities should reflect the diversity of the country's population.*

For capturing the two aspects of justice we use different measures. For measuring the inclusion aspect, we use the proportion of people aged 25–64 participating in formal and non-formal education. In order to capture the fairness aspect we develop an *index of fairness in participation in adult education* (IfairAE). The IfairAE measures the representation of the population within a given social group in adult education. We will focus only on one social group from the population participating in adult education with respect to completed level of initial education compared with the educational structure of the society as a whole. This index

could be assessed also in relation to the place of residence of participants, participants' socio-economic origin and participants' socio-economic status. The IfairAE measures the representation of the population within a given initial educational level in adult education. It uses information on educational level of the participants in adult education and on educational structure in a given society. It is calculated by dividing the proportion of participants in adult education, aged 25–64 with a given initial level of education, by the proportion of people with the same educational level in the entire national population aged 25–64. An index above 1 indicates overrepresentation of the given social group, (defined in our case by the completed level of education of the respondents) in the entire population whereas an index below 1 shows that this group is underrepresented. A value of this index of 1 means that a given social group is perfectly represented within adult education in the respective country. For this chapter, we tested the measure for two social groups: those with low level of education – ISCED 1997 0–2 and those with high level of education ISCED 1997 5–6. For the actual participation in the population we used data from Eurostat that correspond to these two groups.

The analysis of the participation in formal and non-formal adult education reveals that countries differ in terms of their inclusion of people in lifelong learning (See Figure 1). Thus, whereas Croatia, Greece, Hungary, Poland and Romania are among the least inclusive, Finland, Norway, Sweden and the United Kingdom are among the most inclusive countries.

Figure 1. Participation rate in formal and non-formal adult education and training (last 12 months) in 2007 by countries, %.

Source: Eurostat, extracted on 24.06.2016, trng_aes_100

Figure 2 demonstrates the values of IfairAE for the group of people with higher education degree and the group of people with low levels of education. The results show that in all countries the group of people with higher education is overrepresented, whereas the group of people with low level of education is underrepresented in all countries. This suggests that adult education reproduces already-existing educational hierarchies. Despite this, there are country differences in the extent to which these groups are represented. The data also show that in some countries, like Finland, Norway and Sweden, inclusiveness goes hand-in-hand with fairness. At the same time, in Croatia, Greece, Poland and Romania the high levels of IfairAE for low and highly-educated people go hand-in-hand with low inclusiveness. However, we cannot identify a clear country pattern.

Figure 2. Indexes of fairness in participation in adult education for people with low (ISCED 0–2) and higher education (ISCED 5–6).

Source: Adult Education Survey 2007 (own calculations, weighted data - coefindw) & Eurostat, data for 2007 extracted on 24.06.2016, edat_lfs_9903

Viewing lifelong learning through the lens of the capability approach clearly demonstrates the narrowness of the benchmark for participation in lifelong learning at policy level, namely the percentage of people engaged in lifelong learning activities, and the need for this indicator to be complemented by indicators capturing inequalities in participation in lifelong learning. A promising line for future research is the analysis of the dynamics in inclusion and fairness aspects of adult education in different countries using data from the next waves of Adult Education Survey but also from other surveys (eg. Labour Force Survey). It is well known that adult education is characterized by its internal diversity, and its programs vary according to the quality of education offered. Therefore, a fruitful direction for future research is also to calculate the indexes separately for formal and non-formal adult education or for job-related and non-job related non-formal adult education.

Value of adult education

The capability approach broadens our understanding of how lifelong learning may be understood beyond the narrow human capital agenda, in which human lives are viewed exclusively as means to economic gain. By looking at people and their well-being as ends, the capability approach provides grounds to conceptualize the different meanings of lifelong learning and to take into account the plurality of its outcomes. From this perspective employability, which is high on the policy agenda, is very important but not the sole and all-embracing mission of lifelong learning.

For the identification of the various meanings of adult education we use the distinction between job-related and non-job related/personal reasons. In particular, we calculated the proportions of people who participated in formal education and non-formal education and training activities because of these two types of reasons. We presented only the data for the first of these activities reported by the respondents.

Figures 3 and 4 illustrate that, alongside the purely instrumental, job-related reasons, people also engage in formal education or non-formal education and training activities for personal reasons. This shows that people do not only want to improve their employability but also participate in adult education for its own sake or for personal development. However, these figures also reveal that there are cross-national variations in this regard for the participation in both types of adult education. Recognising the motivation of people for participation is crucial for understanding the agency of people and is important in tackling low participation rates in adult education.

Figure 3. Main reasons for participating in formal education activity by country, %

Source: Adult Education Survey 2007 (own calculations, weighted data - coefindw)

Figure 4. Main reasons for participating in non-formal education and training activity by country, %

Source: Adult Education Survey 2007 (own calculations, weighted data - coefindw)

Obstacles to participation in adult education

Given that we are also concerned whether people from different countries have equal capability to participate in adult education, we also looked at the constraints that prevent people from engaging in adult education activities. In other words, we had to consider the reasons for non-participation. We focused on constraints at two levels, which both reveal issues related with access to adult education. The first level refers to the people's aspirations. To a great extent, they are relational and show the scopes of the capability sets of people and whether they envisage adult education as an opportunity at all. The second level refers to more concrete reasons that constrain one's agency.

We tried to check if there were country differences in the obstacles to people's aspiring to participate in adult education and in the obstacles that limit actual participation once people aspired to some education and training. For this sake, we used two variables: *The most important reason why the respondent did not want to participate in education and training*, and *The most important reason why the respondent did not participate or did not participate still more in education and training, though wanted to*. In both cases, we present the results only for the most important reason reported by the highest proportion of people (as a percentage) in a given country.

The results from the analysis show that countries differ in terms of the main reasons why people do not want to participate in education and training that are reported by the highest proportion of their population (Table 2). In almost half of the countries, the majority of people do not aspire to adult education because they did not need it for a job. This suggests that efforts should be made in these countries not to look at learning mainly in an instrumental way but to unfold the intrinsic value of education among people. At the same time, there are also many countries in which the majority of people do not aspire for other reasons – mainly physical ones related to their health. This suggests that in order to boost adult education in these countries, a way should be found to address these problems, because they constrain

people's aspirations and their agency to continue their learning. It seems that raising learners' aspirations in their life course requires solving problems in other areas of life – such as health, or the perceptions of people that their age is too high for them to be active learners.

Table 2. The most important reason why the respondent did not want to participate in education and training by country

Reason	Countries in which the respective reason is reported as the most important by the highest proportion of the population (in percentage)
Did not need it for the job	Austria (17.86), Bulgaria (31.79), Croatia (27.57), Czech Republic (48.06), Finland (32.6), Germany (26.88), Hungary (33.63), Latvia (26.07), Netherlands (33.65), Norway (41.57), Romania (28.35), Slovakia (41.38), Slovenia (29.09)
Health or age of the respondent	Belgium (31.1), Estonia (27.92), Lithuania (29.54), Poland (24.16), Portugal (19.52), Sweden (24.25)
Did not have time because of family responsibilities	Cyprus (32.89), Greece (21.97), United Kingdom (26.01)
Other	Spain (29.89)

Source: Adult Education Survey 2007 (own calculations, weighted data - coefindw)

In contrast to the reasons why people do not want to participate in adult education, which seem to be mainly individual, the reasons that are reported as the most important ones that explain why the respondents did not participate or did not participate still more in education and training, though they wanted, are to a great extent institutional and family related (See Table 3). This suggests that in addition to the efforts necessary to raise people's aspirations, another set of efforts should be directed to improvement of the offer of adult education, so that it allows people to combine it with work or family lives.

Table 3. The most important reason why the respondent did not participate or did not participate still more in education and training, though wanted to by country

Reason	Countries in which the respective reason is reported as the most important by the highest proportion of the population (in percentage)
Training conflicted with the work schedule	Belgium (27.01), Czech Republic (28.6), Finland (27.64), Lithuania (34.55), Latvia (24.67), Norway (25.76), Sweden (25.14), Slovenia (30.54), United Kingdom (31.81)
Training was too expensive or the respondent could not afford it	Bulgaria (37.13), Croatia (31.00), Estonia (31.52), France (32.93), Poland (31.25), Romania (36.81), Slovakia (19.87)
Did not have time because of family responsibilities	Austria (25.35), Cyprus (44.55), Greece (27.34), Germany (19.98), Netherlands (18.63) Portugal (20.21)
Other	Spain (29.69), Hungary (94.67)

Source: Adult Education Survey 2007 (own calculations, weighted data - coefindw)

The empirical analyses on the reasons why people do not want to participate in formal and non-formal education allow us to conclude that the agency of adults to participate in adult education is in fact bounded by the settings people live in. Specifically, bounded agency is socially situated agency, influenced, but not determined, by social structures and environments (Evans 2002, 2007; Rubenson 2009). The concept of bounded agency sees actions in the contingencies of the present moment as influenced not only by past habits and what people believe to be possible for them in the future but also by subjective perceptions of the structures they have to negotiate, the social landscapes which affect how they act (Evans et al. 2013). The analysis of the obstacles pointed to problems of the social conversion factors, particularly those related with the institutional offer of adult education. Obviously, they constrain people's ability to convert the resources (such as time or money) which they have into actual participation because they do not allow people to combine their studies with family responsibilities or work. These constraints also differ by countries and these differences should be taken into account in designing country-specific policies to foster adult education in

order to meet the Europe 2020 national targets for lifelong learning. The participation rates could be enhanced only through solving concrete problems, which go far from education – such as health, work, family and the social sphere.

By broadening perspectives for the empirical study of lifelong learning, the capability approach makes visible some shortcomings and challenges stemming from the characteristics of available datasets and indicators used to measure practices, achievements and policies in lifelong learning. It becomes obvious that there is a need for enriching the available data by including indicators which capture the plurality of values (for both individuals and societies) of lifelong learning and the inequalities in participation in lifelong learning of different social groups.

**In lieu of a conclusion: Lifelong learning –
an emancipating force or a form of social control?**

Now we will go back to the beginning of this chapter and try to discuss the question as to the social role of lifelong learning: whether it is simply a mechanism for realising the hegemonic project of global capitalism, or a specific way of life that enables the individual to unfold their creative abilities and activity in life to the maximum.

Lifelong learning is a radical and all-encompassing change in education and learning, going on under the conditions of late-modernity societies. It implies a quantitative growth of education opportunities, a constant rethinking of the contents of education activities, the unfolding of new forms of education and educational initiatives, significant changes in the status of the individuals and institutions involved in the education process, and qualitative change in the lifestyle of individuals. In practical terms, and from the viewpoint of its results, lifelong learning could be defined as both a means of reproducing existing social inequalities and a factor for mitigating and even eliminating them. In other words, it might work as a

mechanism of social control, but also as an emancipating force for groups and individuals. However, the social role of lifelong learning cannot be postulated beforehand and unequivocally, outside social time and space. Its concrete role reflects the ways in which lifelong learning is realized in concrete historical conditions and in the framework of the concrete relations of this activity with the other social spheres. The practices of lifelong learning are always produced by concrete historical circumstances, due to the existing links and interaction between specific national institutional systems, such as the educational system, the labour market, social policies (See Blossfeld 2002). Thus, our analyses show that lifelong learning has different meanings in different societies. It may be assumed with a great degree of probability that lifelong learning will not have the same social and personal impact in highly-developed, democratic societies as in weakly-developed ones, and also that in each of these groups there might be differences engendered by the specific national institutional systems and by the local manifestations of these systems. Differences might also appear in the way the end result is achieved: for instance, the role of lifelong learning for social reproduction might be fulfilled smoothly and without obstacles, but then again, it might come as an end result of processes of which some are reproductive, while others lead to new social relations. In this respect Wain's analysis is indicative: it shows that there are important differences in the way lifelong learning and the learning society are understood and function in Japan as compared with Europe. In Japan, education is viewed as an inseparable part of life, just like "eating and drinking", while in Europe the initial humanistic ideas of the mid 20th century that tied learning to the overall development of the individual have gradually been substituted by the instrumental discourse that is limited to vocational training (Wain 2001, p. 189). By providing a theoretical framework for the understanding of lifelong learning as an agency process which is embedded in different social and institutional contexts, the present chapter has demonstrated that the capability approach broadens the perspectives both

for grasping different meanings of lifelong learning for individuals and society and for its critical evaluation against the background of a given country's development and the most important social values.

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