

*This is the Authors' Original Manuscript of an article published by SAGE in [Adult Education Quarterly] on [First published: 11-Jan-2017], available online:*

<https://journals.sagepub.com/doi/abs/10.1177/0741713616685398>

**Pepka Boyadjieva**

Institute for the Study of Societies and Knowledge, Bulgarian Academy of Sciences

1000 Sofia, 13A Moskovska str., Bulgaria

Tel: „00359“ – „899 751 574“

E-mail: [pepka7@gmail.com](mailto:pepka7@gmail.com)

**Petya Ilieva-Trichkova<sup>1</sup>**

Institute for the Study of Societies and Knowledge, Bulgarian Academy of Sciences

1000 Sofia, 13A Moskovska str., Bulgaria

Tel: „00359“ – „898 907 529“

E-mail: [petya.ilievat@gmail.com](mailto:petya.ilievat@gmail.com)

---

<sup>1</sup> **Corresponding author:** Petya Ilieva-Trichkova, Institute for the Study of Societies and Knowledge, 13A Moskovska str., 1000 Sofia, Bulgaria. Email: [petya.ilievat@gmail.com](mailto:petya.ilievat@gmail.com)

## **Between Inclusion and Fairness: Social Justice Indexes of Participation in Adult Education**

### **Abstract**

The article aims to show that equity is an indispensable dimension of the widening of access to adult education. Building on the understanding of social justice in adult education as a complex phenomenon, two indicators are developed: an index of inclusion and an index of fairness in participation in adult education. The article analyses social justice separately in formal and non-formal education for two social groups—people with low and high education. Using data from the Adult Education Survey it is shown that in most of the countries there are signs of improvement in the fairness aspect of social justice as a result of a decrease in the overrepresentation of people with high education and in the underrepresentation of people with low education in adult education. However, the inclusion of people with low education in adult education remains considerable lower in comparison to the inclusion of people with high education.

### **Keywords**

social justice, inclusion, fairness, formal and non-formal adult education, indexes, Adult Education Survey

## **Between Inclusion and Fairness: Social Justice Indexes of Participation in Adult Education**

### **Introduction**

Recently, a social inequality perspective towards adult education has gained prominence among researchers (Elman & O’Rand, 2004; Di Prete & Eirich, 2006; Hällsten, 2011; Bask & Bask, 2015). Patterns of participation in adult education, which have been identified and confirmed by several authors, clearly show that younger adults, those with higher educational attainment, those with jobs or those employed in high-skilled occupations, participate more frequently than older, low-educated and unemployed people or those employed in low-skilled occupations (OECD, 2003; Roosmaa & Saar, 2012). It is acknowledged that these patterns of participation lead to growing inequalities, in terms of both education and labour market outcomes, over the life span (Kilpi-Jakonen, Vono de Vilhena, Kosyakova, Stenberg, & Blossfeld, 2012). Studies also reveal that there are two main mechanisms behind the identified patterns and inequalities they produce - cumulative advantage or disadvantage and the Matthew effect (Bask & Bask, 2015). Both mechanisms outline the tendency of a favorable relative position to become a resource that produces further relative gains, i.e. those individuals who are more advantaged, for example in terms of educational attainment, accumulate more (educational) resources and thus – more advantages (Di Prete & Eirich, 2006; Yaqub, 2008; Walker, 2012). Seen from this perspective, the individual’s life history could be defined as “path-dependent and those initially endowed with strategic resources will see them grow at a faster absolute rate (although relative growth rates can be identical), and hence, will make initial differences grow over time” (Hällsten, 2011, p. 538).

Thus, it is often concluded that lifelong learning primarily serves to maintain, rather than to narrow, inequalities attached to social origins (Bukodi, 2016).

The identified patterns of participation in adult education which are more likely to reinforce, rather than mitigate, existing inequalities, pose a serious challenge to the value of adult education and raise the question about equity and social justice in adult education. Although there are valuable contributions, which map the area of social justice in education and higher education (Brennan & Naidoo, 2008; Brighouse, 2003; Furlong & Cartmel, 2009; Gewirtz, 1998, 2006; North, 2006; Walker, 2003; Walker & Unterhalter, 2007; Zajda, Majhanovich, & Rust, 2006; etc.), the social justice implications related to adult education have not been systematically and thoroughly discussed yet. Recently, the issue of social justice in adult education has gained prominence among researchers (for example Kasworm, Rose, & Ross-Gordon, 2010; Riddell, Markowitsch, & Weedon, 2012; Francois, 2014; Unterhalter, 2014). Indicative in this respect is the special issue on Lifelong learning and social justice in the *International Journal of Lifelong Education* (2011) and the establishment, at the beginning of 2016, of a new journal, titled “Dialogues in Social Justice: An Adult Education Journal”.

Against this background, the article claims that the social justice perspective is indispensable for both research and policy-making in the sphere of adult education. It aims to contribute to the literature on social justice in adult education in a number of ways. *First and foremost*, we give a comprehensive account of how social justice in adult education can be conceptualized and measured. *Second*, we go beyond the narrow information provided by the participation rates in adult education and explore how participation in adult education in different European countries looks like through a social justice perspective. *Third*, instead of following a life course perspective and make inter-individual or intra-individual comparisons, we make cross-national comparisons and use macro-level data. *Fourth*, in contrast with most previous studies,

we focus, not on adult education as a whole, but consider its internal diversity and make separate analyses for two of the most common forms of adult education: formal and non-formal education.

Recently, lifelong learning and adult education/learning have been highly-discussed topics in both academic and policy spheres. Authors use different terminology and suggest different understandings of the concepts (Jarvis, 2010; Holford, Milana, & Špolar, 2014, Blossfeld, Kilpi-Jakonen, Vono de Vilhena, & Buchholz, 2014). We differentiate between adult education and adult learning and view them as important forms of lifelong learning. Adult education refers 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. In this article we focus on adult education.

The article proceeds as follows. First, we present the theoretical background of the article and formulate our research questions. Then we propose research methodology. After that, we discuss the results of the study. Finally, we make some concluding remarks and suggest directions for further research.

### **Theoretical background and research questions**

It has been pointed out that ‘social justice’ is often taken as an unconditional good and that there are few attempts to define its meaning (Jackson, 2011). A recent paper summarizes the way social justice has been understood in different philosophies of adult education (Francois, 2014). However, the author does not refer to the philosophy of Amartya Sen and his capability approach. We find Sen’s philosophy very promising in conceptualizing social justice in education, adult education included, and will use it as a theoretical framework for further conceptualizing social justice in adult education and developing new measures for capturing it.

There are two different lines of reasoning about how justice may be achieved, which date since the Enlightenment and can be found in the most influential contemporary theories of justice: transcendental institutionalism and comparative (see Sen, 2009). The first one is based on the idea of establishing a hypothetical social contract, which aims at contributing towards the achievement of justice in society. This approach, adopted by John Rawls (1971) in his theory of “justice as fairness”, is concentrated on identifying perfectly-just institutions and, in its essence, is arrangement-focused. It implies the identification of the right behaviour or right institutions. In strong contrast to this line of reasoning, the second one adheres to the idea that justice may be achieved on the basis of making comparisons between different ways in which people’s lives may be led, and thus ascertaining which one is more or less just. In its nature, it implies making realization-focused comparisons. More specifically, the “comparative” approach focuses on ranking alternative social arrangements, instead of concentrating exclusively on the identification of a fully-just society. Thus, it is also concerned with human behaviour, rather than assuming that once institutions are perfectly arranged, and that perfect behaviour has been identified, people will simply follow it accordingly. This line of reasoning, adopted by Amartya Sen in his account of justice (2009), can make a valuable contribution to addressing questions about the enhancement of justice and the removal of injustice in the world. In Sen’s view, justice is a “momentous concept” (Sen, 2009, p. 401) and the comparative questions are inescapable for any theory of justice that tries to give some kind of guidance to public policy or personal behaviour. Sen is in favor of the comparative route to justice because of the possibility, even having just institutions, of observing injustices at the individual level and in people’s everyday lives. Thus, Sen’s comparative approach to justice could contribute to identifying spaces of injustice and for engagement in their removal. The informational basis of Sen’s theory of justice is human capability, as the capability should be understood as a special kind of freedom, which refers to

the alternative combinations that are feasible for a person to achieve. In this sense, capability is determined by the space of possibilities open to an individual – not in terms of some prior end such as utility or initial conditions such as equality of primary goods, resources or utilities. As Regmi (2016) has recently noted, Sen’s approach and its application in the area of education can fall into the group of humanistic models of lifelong learning, whose main purpose is to create a better world by alleviating social inequality, reducing social injustices and ensuring human rights for all. Simon Marginson (2011) applies Sen’s approach to justice to higher education. He argues that 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 refers “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, Tremblay, Basri, & Arnal, 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 concentrates on the proportional distribution of student places (or graduations) between different social groups (Marginson, 2011, pp. 23-24).

Relying on Sen’s understanding of the two approaches to justice (Sen, 2009) and Marginson’s (2011) differentiation between fairness and inclusion aspects of equity in higher education, we argue that in order to explore the expansion of adult education in a given country, we need to ask at least three questions: *What growth?*, *Access for whom?*, and *Access to what?*

The answer to the first question provides a general view of the increase in proportions of people from different social groups involved in adult education, and thus captures the inclusion aspect of participation in adult education. The second question refers to the relative chance of representatives of different social groups of entering different types and programs of adult education and thus reveals the fairness aspect of participation in adult education. The third question takes into account the differences in quality of different programs of adult education. In this regard, we should always take into account the fact that adult education has different types; the three main ones being formal adult education, non-formal and informal. Thus, we conceptualise social justice in adult education by differentiating two aspects of participation in it: inclusion and fairness, which need to be analyzed separately for different types and different programs of adult education.

Recently, many studies have focused on revealing the main micro and macro-level factors which determine participation in adult education. With the unfolding of the process of globalization, two important macro developments – demographic aging and accelerated economic change – have emerged as common factors influencing participation in adult education all over the world (Kilpi-Jakonen, Buchholz, Dämmrich, McMullin, & Blossfeld, 2014; Buchholz, Jensen, & Unfried, 2014). Both factors are important drivers for active national policies in the sphere of adult education, and thus positively influence participation rates in it. However, data show that, despite the influence of these common factors, there are considerable country differences in participation in education and training (last 4 weeks) of people aged 25-64. For example, in 2014, the participation rate ranged from below 2% in Bulgaria and Romania to more than 20% in Finland, Iceland, and Denmark (Eurostat, code: trng\_ifs\_01. Data extracted on 20.04.2016). Relying on cross-national survey data, a study has shown that “adult education and training systems are deeply embedded in national social and institutional structures, in how state,



market, and family structures deliver social rights, and in patterns of social stratification” (Boeren & Holford, 2016, p. 137).

Based on our understanding of social justice, and taking into account these studies, we aim to answer the following research questions:

*RQ1: Do countries differ with respect to the extent to which their adult education is inclusive and fair?*

*RQ2: Do inclusion and fairness in adult education go hand-in-hand at country level?*

Recently, there has been a clear tendency among researchers to carry out more differentiated analyses taking into consideration the specificity of different types of lifelong learning. Analyses show that there are not only differences between countries and social groups in participation rates in formal and non-formal adult education but also that the level of social inequalities is different depending on the type of adult education (Blossfeld et al., 2014; Kilpi-Jakonen, Vono de Vilhena, & Blossfeld, 2015; Boeren & Holford, 2016). Against the background of these results, we ask:

*RQ3: Do the inclusion and fairness aspects of adult education differ for different types of adult education (formal and non-formal)?*

An important feature of modern societies is rapid economic change, which in recent years has been associated with the development of knowledge economies and knowledge societies. In order to catch up with these developments, people need to constantly advance their knowledge and skills. This refers especially to low-educated people. Within this context, a recent publication by the European Commission (2013, p. 14, 16) defines, as a second function of adult and continuing education policy, “to correct the social exclusion produced, first of all, by the education system, from school to university, as well as by other factors that impact on the socialisation of young people” and, as a third function, “to build inclusion opportunities for low-skilled people,

whether they have no qualifications or their skills are obsolete”. The data show a pattern of progressive decline in the number of low-educated people in all age groups, although the trend is slow and is more pronounced among the younger generations (European Commission, 2013).

Based on this, we will ask:

*RQ4: Are there any positive trends in inclusion and fairness aspects of social justice in adult education over time?*

## **Research methodology**

### *Data*

The empirical basis of our study is the Adult Education Survey (AES). This survey, conducted via random sampling procedure, targets people aged 25-64 who live in private households. The AES is part of the European Union (EU) statistics on lifelong learning and collects primary data on participation in education and training (formal, non-formal and informal learning) and a wide range of socioeconomic characteristics, such as age, gender, country of residence etc. The survey takes place every five years. So far, two rounds of the survey have been conducted: a pilot phase (2007) and the first wave (2011). The data from the second wave are still not available. The survey allows us to adopt a wide comparative perspective, as it was conducted in many European countries – either members of the EU or not. The number for the pilot survey was 29, whereas in the second wave it was 30. However, in the files with micro data for this survey obtained by Eurostat, for the first wave, data are available only for 26 countries (Belgium, Bulgaria, the Czech Republic, Denmark, Germany, Estonia, Greece, Spain, France, Croatia, Italy, Cyprus, Latvia, Lithuania, Hungary, the Netherlands, Austria, Poland, Portugal, Romania, Slovenia, Slovakia, Finland, the United Kingdom, Sweden and Norway). In the second wave, data are available for all 30 countries: Belgium, Bulgaria, the Czech Republic, Denmark, Germany,

Estonia, Greece, Spain, France, Croatia, Italy, Ireland, Cyprus, Latvia, Lithuania, Hungary, Malta, the Netherlands, Austria, Poland, Portugal, Romania, Slovenia, Slovakia, Finland, the United Kingdom, Sweden, Norway, Switzerland and the Republic of Serbia. Both datasets allow weighting of the data. Classifications related to education follow the International Standard Classification of Education (ISCED) revision 1997 for both surveys.

### *Indexes*

We develop two indexes in order to capture social justice in participation in adult education: *an index of inclusion in participation in adult education* (IincluAE) and *an index of fairness in participation in adult education* (IfairAE). The IincluAE is calculated as the ratio between participation rates of a given social group in two temporal points, in our case – 2011 to 2007. An index above 1 indicates a trend of inclusion of the given social group, whereas an index below 1 shows a trend exclusion of this group over time. Social groups could be defined based on different characteristics, such as: completed level of education, occupation status, place of residence, gender and age. We focus only on social groups with respect to completed level of initial education. The IfairAE measures the representation of the population within a given social group in adult education at a given point in time. The IfairAE 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 among the participants in adult education whereas an index below 1 shows that this group is underrepresented. An index value of 1 means that a given social group is perfectly represented within a given form of adult education in the respective country. We calculated the IincluAE and the IfairAE for two social groups: those with a low level of education, ISCED 1997 0-2, and

those with a high level of education, ISCED 1997 5-6. For the levels of education of the population of a given country we used data from Eurostat that correspond to these two groups.

It should be emphasised that adult education is characterized by its internal diversity, and its programs vary according to the quality of education offered. Therefore, in order to capture the two main forms of adult education, we calculated the indexes separately for formal and non-formal education. We measure formal education as the proportion of adults who participated in formal education during the last 12 months, whereas non-formal education as the proportion of adults who participated in at least one non-formal education and training activity (such as courses, workshops and seminars, guided on-the-job training, private lessons) during the last 12 months.

### *Context*

Figures 1 and 2 show the participation rates in formal and in non-formal education by the level of education people have attained in 2007. They indicate two main trends: adults tend to prefer to pursue non-formal education activities rather than formal ones and that adults with higher education are more likely to participate in any form of education compared with their low-educated peers. Despite these common trends, the figures demonstrate that countries differ considerably in the participation rates in both forms of adult education. Thus, Belgium, the United Kingdom and Sweden have the highest proportion of adults with higher education who pursue formal education, while Greece, Hungary and Bulgaria having the lowest rates. In Hungary, Romania and Greece, a very low proportion of adults with low and high education participated in non-formal education in 2007, whereas in Sweden, Norway, the Netherlands, Denmark and the United Kingdom a very high proportion of adults did so.

- **Figure 1.** Participation rate in formal education by educational attainment level and by countries in 2007. about here –

- **Figure 2.** Participation rate in non-formal education by educational attainment level by countries in 2007. about here -

Overall, the participation rates allow us to compare them at a country level as of a given year. Bearing in mind the differences in the participation rates of adults with different educational level, we continue the article with presenting the main results derived from the calculation of our indexes, which we built upon our theoretical framework and which we made separately for the two forms of adult education: formal and non-formal. However, the use of more differentiated forms of adult education comes at a certain price. For our analyses, we used data from the two waves of AES from 2007 and 2011. Due to Eurostat data use restrictions, it was not possible to present results that refer to less than 20 observations. Therefore, it was not possible to calculate the indexes for all participating countries. Despite that, we think that they still provide us with important insights on the development of both aspects of social justice: *inclusion* and *fairness*. Both aspects of social justice could also be assessed from a comparative perspective; this means comparing the indexes of inclusion and fairness in adult education of different countries.

## **Results**

### *Formal education*

The analysis of the *IincluAE* for adults aged 25-64 reveals that countries differ in terms of the inclusiveness of formal education for adults with different levels of education (See Figure 3).

Thus, formal education has become more inclusive in regard to higher education in the period

between 2007 and 2011 in nine of the countries, with Hungary, Austria, and the Netherlands being among the most-inclusive ones. The figure also shows that the majority of the countries' formal education became less inclusive for the highly-educated adults over time. This is very pronounced in Italy, Latvia, Lithuania and Romania. The index values for low education show that inclusion of this group occurred in Portugal, Sweden, Poland, Spain, Finland, the Netherlands and the United Kingdom.

- **Figure 3.** Indexes of inclusion in participation in adult formal education 2011/2007 for people with low and high education. about here -

Figures 4 and 5 present the values of fairness indexes for participation in formal adult education for the groups of people with low education and with high education, as of 2007 and 2011. The results show that the group of people with low level of education is underrepresented in all countries for which data were available, whereas the group of highly-educated people among the participants in formal education is overrepresented in all countries. This suggests that adult formal education reproduces already-existing educational hierarchies in all countries. Despite this, there are country differences in the extent to which these two groups are represented. The data show that in some countries, like Portugal, Belgium, Austria and Luxemburg, the underrepresentation of people with low education is at the lowest levels, whereas in Poland, Switzerland and Italy, the representation of these people is very far from being fair. In Portugal, Belgium, Finland, Sweden, Spain and Poland there is an enhancement of fairness over time.

- **Figure 4.** Fairness indexes of formal education for people with low education. about here -

As regards people with high education, the countries with the fairest representation are Finland, Slovenia, Denmark, the United Kingdom and the Netherlands. At the other extreme are Malta, Romania and Slovakia, where the representation of the group with high education is more than three times higher than its proportion in the general population. Dynamics of the IfairAE for people with high education reveals that in most of the countries, except Slovakia, Romania, Germany, France, Austria, Denmark and the Czech Republic, there is a decrease in the overrepresentation of this group.

The values of the indexes show that inclusion and fairness may not always go hand-in-hand. Thus, in the Netherlands and Hungary, more inclusion with regard to highly-educated adults in formal education is associated with higher fairness in their participation. However, in other cases, like Slovakia and Austria, the inclusion aspect goes hand-in-hand with less fairness over time with regard to people with high education. The index values also show that in some countries, such as Sweden, Poland, Portugal, Spain and Finland, more inclusion of people with low education is associated with more fairness in their representation in formal education, but in others, like the Netherlands, more inclusion goes hand-in-hand with less fairness in participation of people with low education in formal education.

- **Figure 5.** Fairness indexes of formal education for people with high education. about here -

*Non-formal education*

The analysis of the *IincluAE* in non-formal education for adults aged 25-64 reveals that countries differ in terms of their inclusiveness of groups with different levels of education (See Figure 6). Thus, non-formal education has become more inclusive in regard to people with both low and high education in the period between 2007 and 2011 in more than half of the countries studied. The figure also shows that non-formal education has become more inclusive for low-educated people to a greater extent than for high-educated ones in ten of the countries. This is very pronounced in Italy, Portugal, Denmark, Germany and Austria.

- **Figure 6.** Indexes of inclusion in participation in adult non-formal education 2011/2007 for people with low and high education. [about here](#) -

Finally, Figures 7 and 8 present the values of fairness index for the groups of people with low education and with high education. The results show that, similarly to formal education, in all countries the group of people with low level of education is underrepresented in non-formal education, whereas the group with high education is overrepresented. Despite this, there are country differences in the extent to which these two groups are represented in this type of adult education. The indexes show that in some countries, like Luxemburg, Portugal, and Finland, the underrepresentation of adults with low education in 2011 is relatively low, whereas in Greece, Poland and Romania it is persistently high. Dynamics of the *IfairAE* for people with low education reveal that in half of the countries, namely Portugal, Hungary, Spain, Slovenia, Austria, the Czech Republic, the United Kingdom, Greece and Poland, there is a decrease in the underrepresentation of this group.



- **Figure 7.** Fairness indexes of non-formal education for people with low education. about here -

As regards adults with high education, the countries with the persistently fairest representation are Finland, the United Kingdom, the Netherlands and Denmark. At the other extreme are Romania, Greece, Poland and Slovakia. Despite that, we observe some positive trends with regard to the fairness in the participation of this social group in non-formal education. Thus, dynamics of the IfairAE for people with high education shows that in most of the countries, except Sweden, Norway, Germany, Cyprus, Bulgaria, Belgium and Lithuania, there is a decrease in the overrepresentation of this group. More specifically, there was a considerable increase of fairness in Romania, Poland, Italy, Portugal and Hungary.

- **Figure 8.** Fairness indexes of non-formal education for people with high education.

about here -

Overall, the indexes demonstrated that in some countries, like Italy and Portugal, more inclusion of adults with low education goes hand-in-hand with more fairness in the participation in non-formal education, but in others, like Germany and France, inclusion of adults with low education in non-formal education goes hand-in-hand with a slight deterioration of fairness. At the same time, in countries in which we observed the highest levels of inclusion of adults with low education, we also observed improvement of fairness in their participation. These are Italy, Portugal, Spain, Austria and Poland. In the case of the least inclusive countries, the United Kingdom, Bulgaria and Greece, we observed two patterns: whereas in Bulgaria and Greece fairness in non-formal education decreased with regard to adults with high education, in the

United Kingdom the low levels of inclusion were associated with more fairness. Furthermore, the United Kingdom is the least-inclusive country with regard to adults with high education, but is also among the countries with the fairest participation in non-formal education.

## **Discussion and conclusion**

The article aims to demonstrate that equity is an indispensable dimension of the widening of access to adult education. It is stated that “like ‘equality of opportunity’ or ‘choice’, ‘social justice’ is one of those politically malleable and essentially contested phrases which can mean all things to all people” and that it tends to suffer from “vagueness and oversimplification” (Thrupp & Tomlinson, 2005, p. 549). In defining social justice in adult education, the article builds on Sen’s approach to justice and its application to higher education by Marginson (2011). We argue that social justice in adult education is a complex phenomenon, which is context and time-specific. The article differentiates between inclusion and fairness aspects of social equity in adult education and claims that they should be studied separately for different social groups.

Recently, the issue of indicators for adult education has attracted researchers’ attention. Studies have questioned the use of the EU’s lifelong learning participation index for policy purposes, particularly at the national level, as limiting the analyses of changes over time (eg. Boeren & Holford, 2016). As Boeren and Holford (2016, p. 137) put it, “lifelong learning participation index is no more than a descriptive tool; it allows no multivariate exploration of other variables related to participation”. We agree with Unterhalter (2014, p. 184), who argues that an “indicator on participation, lifelong learning, equity, and empowerment” is “necessary for more comprehensively addressing education in a post- 2015 agenda”. Building on the understanding of social justice in adult education as a complex phenomenon, the article develops and successfully applies two indicators – *IincluAE* and *IfairAE* – for measuring the inclusion and

fairness aspects of social justice in adult education. In so doing, we have gone beyond the narrow perspective of inclusion measured simply with participation rates in adult education as of a given year. By developing these two quantitative indexes, the article also methodologically enriches the study of equity in adult education which has been analyzed mainly through qualitative research methods (see, for example, the special issue *Lifelong learning and social justice* of the International Journal of Lifelong Education (2011). Discussing the goals of equity policy in higher education, Marginson (2011) argues that equity as inclusion should be prioritized over equity as fairness. We claim, and try to show through our analyses, that for explorative and explanatory purposes, both perspectives should be simultaneously taken into account.

The *IcluAE* and *IfairAE* reveal specific features of participation in adult education, which are not captured through the already-existing measures and indicators. This is clearly evident from the fact that some countries, which do not have high participation rates (for example France), are more inclusive and fair in comparison to countries with very high participation rates.

We analyze separately social justice in formal and non-formal education for two different social groups – people with low and with high education. Thus, our approach and results are in line with authors who claim that “isolating different types of life learning is a fruitful enterprise since it unveils patterns else (sic) hidden. Each and every type of training or education should be analyzed separately before reaching conclusions on the inequality of the distribution of lifelong learning” (Hällsten, 2011, p.553). With regard to our research questions, we found that:

- Countries differ in terms of the inclusiveness and fairness of formal education for adults with different levels of education.
- In the majority of the countries, formal education became less inclusive for the high-educated adults over time. The index of inclusiveness in formal education for low-educated people shows a trend of inclusion of this group in most of the countries studied.

However, since we do not have data for some countries we cannot conclude whether this is a common trend. With regard to non-formal education, the data show that it has become more inclusive for low-educated people to a greater extent than for high-educated ones in most of the countries. These results show that the inclusion aspect of social justice in adult education differs for the two types of formal education, and for people with different levels of initial education. The different patterns we observed in regard to both types of adult education are consistent with other studies, which have shown that the isolation of different types of lifelong learning is a fruitful endeavour since it unfolds patterns that may be hidden and because they may indicate different conclusions about the inequality (or different mechanisms) of the distribution of lifelong learning (Hällsten, 2011; Kilpi-Jakonen et al., 2014).

- The most-inclusive countries are not always the fairest, and vice versa, and this holds true for both formal and non-formal education and for the two studied groups – low and high-educated people.
- In most of the countries, we witnessed a decrease in the overrepresentation of people with high education and in the underrepresentation of people with low education in adult education. These trends lead to some improvement of the fairness aspect of social justice. However, the inclusion of people with low education in adult education remains considerably lower in comparison to the inclusion of people with high education.

Almost all of the studies of adult education confirm that “at first sight, adult education lacks capacity to contribute significantly to social transformation for social justice” (Tuckett, 2015, p. 245) and that people with high levels of initial education are able to pursue opportunities for lifelong learning far more readily than those with low or inadequate formal education (Waller, Holford, Jarvis, Milana, & Webb, 2015; Kilpi-Jakonen et al. 2015; Roosmaa & Saar, 2012). Our

results are in line with those authors who have challenged this main strand of research, by revealing that adult education has a potential – although a limited one – to mitigate the power of the existing educational hierarchies (Kilpi-Jakonen et al., 2012; Hällsten, 2011). Although adult education reproduces existing educational hierarchies in almost all countries studied, the fact that countries differ considerably with regard to underrepresentation of people with low education and overrepresentation of people with high education and in the tendencies over time, points out that, under certain social conditions, adult education has the power to influence educational inequalities. Thus, although “lifelong learning involves atypical educational transitions off the main track and cannot be the main driving force behind educational or other inequality on a larger scale”, under certain social conditions it “may provide a possibility to ‘catch up’ for the unemployed, for individuals in marginalized positions in the labour market and for individuals with initial educational failures” (Hällsten, 2011, p. 538) and thus help build a fairer society.

The present article raises some serious questions, which deserve further research. It is very important to continue the theoretical reflection on the understanding of social justice in adult education and how it relates to other issues in adult education, for example quality and effectiveness. The social justice in adult education needs to be studied with regard to all different social groups, i.e. to groups differentiated, not only on the basis of completed initial education, but on characteristics such as occupational status, place of residence, and age. Our results reveal some considerable differences between countries with regard to inclusion and fairness aspects of social justice in adult education. A fruitful direction for future study refers to factors at both macro and micro level, which could explain these differences. At macro level, for example, it is worth investigating how different types of welfare regimes, social cohesion regimes and specificity of educational systems influence social justice in adult education. Having in mind the conclusion of Kilpi-Jakonen et al. (2012, p. 65) that “adult education does not fully fit with

general social inequality patterns”, it is also interesting to examine the relationship between countries’ social inequality index and social justice index (See Schraad-Tischler, 2015) and indexes for inclusion and fairness in adult education. We have analyzed social justice in adult education without differentiating between job-related and non-job-related adult education. A recent study (Knipprath, 2015) shows that participation in lifelong learning is marked by a Matthew effect only in the case of job-related learning activities. This is in line with our theoretical argument that social justice in adult education needs to be analyzed separately for different types and different programmes of adult education.

The analyses presented in the article could be of interest from a policy point of view as well. Recently, the European Commission (2013) published the report *Adult and continuing education in Europe: Using public policy to secure a growth in skills?*, which is based on a review of several research projects financed within the Sixth and Seventh Framework Research Programmes. The report defines “[g]uaranteeing adequate equity in growth opportunities” as the second function of adult and continuing education policy (ibid. p. 14). Other authors, (Thrupp & Tomlinson, 2005; Waller et al., 2015), also argue for the need to support a notion of social justice against policies which will maintain or intensify injustices. Applying a social justice approach to adult education is a way to counter the purely-economic view on lifelong learning (Heckman & Masterov, 2007). A prerequisite for the transformation of the social justice perspective of national and European policies to adult education from an inspiring slogan into reality and for the development of adequate policy measures is the deepening of the theoretical understanding of social justice in adult education and the improvement of data and indicators for its assessment.

## **Funding**

The author(s) disclosed receipt of the following financial support for the research, authorship, and/or publication of this article: The authors gratefully acknowledge the support of the projects “Encouraging Lifelong Learning for an Inclusive and Vibrant Europe—ENLIVEN” (2016-2019) funded by the European Union’s Horizon 2020 research and innovation program under Grant Agreement No. 693989 and “Culture of giving in the sphere of education: social, institutional, and personality dimensions” (2014-2017) funded by the National Science Fund (Contract Number K02/12, signed on 12.12.2014), Bulgaria. This article is based on data from Eurostat, Adult Education Survey, 2007, 2011 obtained for the needs of Research Project Proposal 339/2015-AES. The responsibility for all conclusions drawn from the data lies entirely with the authors.

## **References**

- Bask, M., & Bask, M. (2015). *Cumulative (Dis)Advantage and the Matthew Effect in Life-Course Analysis*. PLoS One. 2015; 10(11): e0142447. Published online 2015 Nov 25.  
doi: 10.1371/journal.pone.0142447.
- Blossfeld, H. P., Kilpi-Jakonen, E., Vono de Vilhena, D. & Buchholz, S. (2014). *Adult Learning in Modern Societies. An International Comparison from a Life-course Perspective*. Cheltenham, UK, Northampton, MA, USA: Edward Elgar.
- Boeren, E., & Holford, J. (2016). Vocationalism Varies (a Lot): A 12-Country Multivariate Analysis of Participation in Formal Adult Learning. *Adult Education Quarterly*, 66(2), 120-142.
- Brennan, J., & Naidoo, R. (2008). Higher education and the achievement (and/or prevention) of equity and social justice. *Higher education journal*, 56, 287-302.

- Brighouse, H. (2003). *School Choice and Social Justice*. Oxford: University Press.
- Buchholz, S., Jensen, V., & Unfried, J. (2014). Reinforcing Social Inequalities? Adult Learning and Returns to Adult Learning in Germany. In H. P. Blossfeld, E. Kilpi-Jakonen, D. Vono de Vilhena, & S. Buchholz (Eds.), *Adult Learning in Modern Societies. An International Comparison from a Life-course Perspective* (pp. 242-263). Cheltenham, UK, Northampton, MA, USA: Edward Elgar.
- Bukodi, E. (2016). Cumulative inequalities over the life-course: Life-long learning and social mobility in Britain. *Barnett papers in social research*, working paper 16-02.
- Davis, C. A., & Sodano, K. (2011, April 28-30). Reclaiming social justice: A position paper investigating competing representations of adult education and its purpose in a neo-liberal world. In O. Unluhisarcikli, G. Guvercin, O. Seckin, & I. Sabirli (Eds.), *Between Global and Local: Adult Learning and Development, Positioning and Conceptualizing Adult Education and Learning within Local Development* Proceedings Book (pp. 86-94). Istanbul, Turkey: Bogazici University Press.
- DiPrete, T. A., & Eirich, G. M. (2006). Cumulative Advantage as a Mechanism for Inequality: A Review of Theoretical and Empirical Developments. *Annual Review of Sociology*, 32, 271-297.
- Elman, C., & O'Rand, A. M. (2004). The Race Is to the Swift: Socioeconomic Origins, Adult Education, and Wage Attainment. *American Journal of Sociology*, 110(1), 123-160.
- European Commission (2013). *Adult and continuing education in Europe: Using public policy to secure a growth in skills?* Luxembourg: Publications Office of the European Union.
- European Commission/EACEA/Eurydice (2015). *Adult Education and Training in Europe: Widening Access to Learning Opportunities*. Eurydice Report. Luxembourg: Publications Office of the European Union.

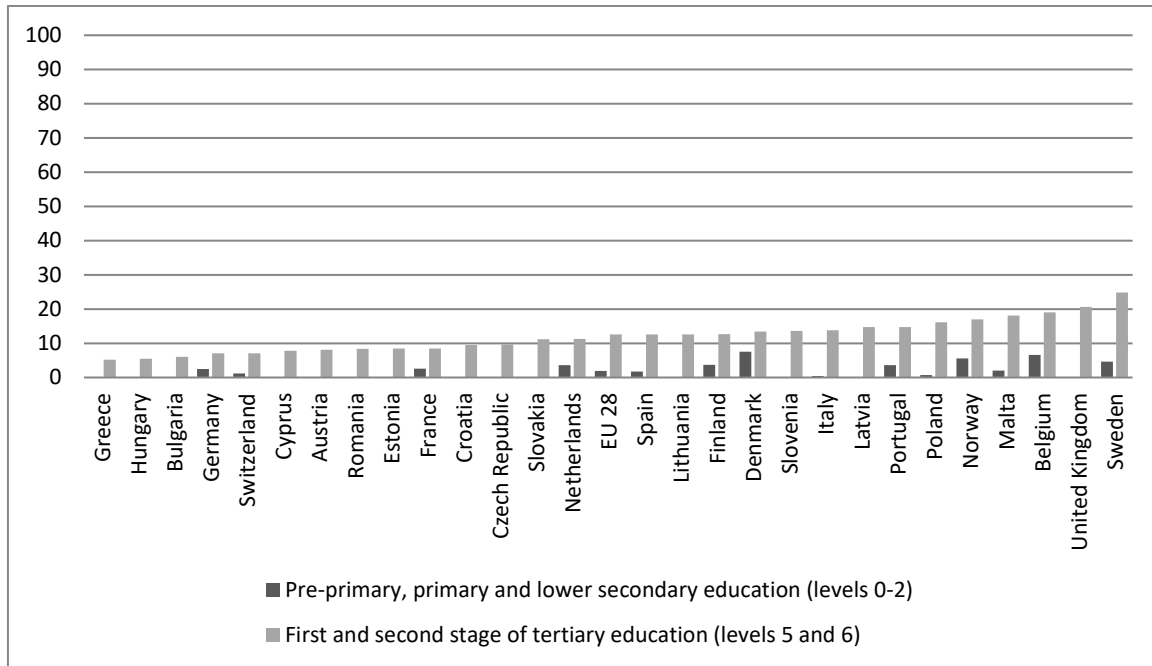


- Francois, J. E. (2014). Social Justice and Philosophies of Adult Education. The Meaning of Social Justice in Philosophy of Adult Education Theories. *European Journal of Academic Essays*, 1(6), 7-11.
- Furlong, A., & Cartmel, F. (2009). *Higher Education and Social Justice*. Maidenhead: Open University Press.
- Gewirtz, S. (1998). Conceptualizing social justice in education: mapping the territory. *Journal of Education Policy*, 13(4), 469-484.
- Gewirtz, S. (2006). Towards a Contextualized Analysis of Social Justice in Education. *Educational Philosophy and Theory*, 38(1), 69-81.
- Hällsten, M. (2011). Late Entry in Swedish Tertiary Education: Can the Opportunity of Lifelong Learning Promote Equality Over the Life Course? *British Journal of Industrial Relations*, 49(3), 537-559.
- Heckman, J., & Masterov, D. V. (2007). The productivity argument for investing in young children. *Review of Agricultural Economics*, 29, 446-493.
- Holford, J., Milana, M., & Mohorčič Špolar, V. (2014). Adult and lifelong education: the European Union, its member states and the world. *International Journal of Lifelong Education*, 33(3), 267-274.
- Jackson, S. (2011). Lifelong learning and social justice. *International Journal of Lifelong Education*, 30(4), 431-436.
- Jarvis, P. (2010). *Adult education and lifelong learning: Theory and practice* (4th ed.). London, New York: Routledge.
- Kasworm, C., Rose, A., Ross-Gordon (Eds.) (2010). *Handbook of Adult and Continuing education* (2010 ed.). Los Angeles, London: SAGE.

- Kilpi-Jakonen, E., Vono de Vilhena, D., Kosyakova, Y., Stenberg, A., & Blossfeld, H. P. (2012). The Impact of Formal Adult Education on the Likelihood of Being Employed: a Comparative Overview. *Studies of Transition States and Societies*, 4(1), 48-68.
- Kilpi-Jakonen, E., Buchholz, S., Dämmrich, J., McMullin, P., & Blossfeld, H. P. (2014). Adult Learning, Labor Market Outcomes, and Social Inequalities in Modern Societies. In H. P. Blossfeld, E. Kilpi-Jakonen, D. Vono de Vilhena, & S. Buchholz (Eds.), *Adult Learning in Modern Societies. An International Comparison from a Life-course Perspective* (pp. 3-28). Cheltenham, UK, Northampton, MA, USA: Edward Elgar.
- Kilpi-Jakonen, E., Vono de Vilhena, D., & Blossfeld, H. P. (2015). Adult learning and social inequalities: Processes of equalisation or cumulative disadvantage? *International Review of Education*, 61(4), 529-546.
- Knipprath, H., & Katleen De Rick, K. (2015). How Social and Human Capital Predict Participation in Lifelong Learning: A Longitudinal Data Analysis. *Adult Education Quarterly*, 65(1), 50-66.
- Marginson, S. (2011). Equity, Status and Freedom: A Note on Higher Education. *Cambridge Journal of Education*, 41(1), 23-36.
- North, C. (2006). More Than Words? Delving Into the Substantive Meaning(s) of “Social Justice” in Education. *Review of Educational Research Winter*, 76(4), 507-535.
- OECD (2003). *Beyond Rhetoric: Adult learning policies and practice*. Paris: OECD.
- Regmi, K. D. (2016). Lifelong learning: Foundational models, underlying assumptions and critiques. *International Review of Education*, 61, 133-151.
- Riddell, S., Markowitsch, J., & Weedon, E. (Eds.) (2012). *Lifelong learning in Europe: Equity and efficiency in the balance*. Bristol, England: Policy Press.

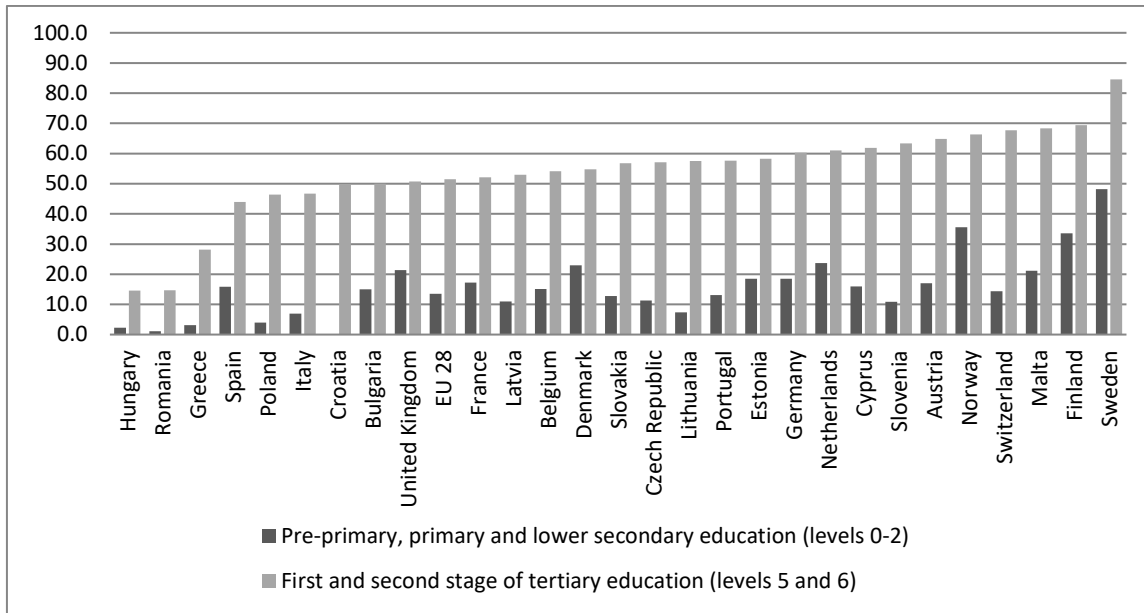
- Roosmaa, E. L., & Saar, E. (2012). Participation in non-formal learning in EU-15 and EU-8 countries: demand and supply side factors, *International Journal of Lifelong Education*, 31(4), 477-501.
- Santiago, P., Tremblay, K., Basri, K., & Arnal, E. (2008). *Tertiary Education for the Knowledge Society. Vol 2: Special Features: Equity, Innovation, Labour Market, Internalisation*. Paris: OECD.
- Schraad-Tischler, D. (2015). *Social Justice in the EU. Index Report 2015. Social Inclusion Monitor Europe*. Bertelsmann Stiftung. Bielefeld: Matthiesen Druck.
- Sen, A. (2009). *The Idea of Justice*. Cambridge, Massachusetts, TheBelknap Press of Harvard University Press.
- Thrupp, M., & Tomlinson, S. (2005). Introduction: Education policy, social justice and ‘complex hope’. *British Educational Research Journal*, 31, 549-556.
- Tuckett, A. (2015). Adult Education, Social Transformation and the Pursuit of Social Justice. *European Journal of Education*, 50(3), 245-250.
- Unterhalter, E. (2014). Measuring Education for the Millennium Development Goals: Reflections on Targets, Indicators, and a Post-2015 Framework. *Journal of Human Development and Capabilities*, 15(2-3), 176-187.
- Walker, M. (2003). Framing Social Justice in Education: What does the ‘Capabilities’ Approach offer? *British Journal of Educational Studies*, 51(2), 168-187.
- Walker, M. (2012). Egalitarian policy formulation in lifelong learning: Two models of lifelong education and social justice for young people in Europe. In D. N. Aspin, J. Chapman, K. Evans, & R. Bagnall (Eds.), *Second international handbook of lifelong learning* (pp. 181-194). Dordrecht: Springer.

- Walker, M., & Unterhalter, E. (Eds.) (2007). *Amartya Sen's Capability Approach and social justice in education*. New York: Palgrave.
- Waller, R., Holford, J., Jarvis, P., Milana, M., & Webb, S. (2015). Neo-liberalism and the shifting discourse of 'educational fairness'. *International Journal of Lifelong Education*, 34(6), 619-622.
- Yaqub, S. (2008). Capabilities across the lifecourse: At what age does poverty damage most? In F. Comim, M. Qizilbash & S. Alkire (Eds.), *The capability approach. Concepts, measures and applications* (pp. 437-457). Cambridge, Cambridge University Press.
- Zajda, J, Majhanovich S., & Rust, V. (2006). Education and Social Justice: Issues of Liberty and Equality in the Global Culture. In J. Zajda, S. Majhanovich, & V. Rust (Eds.), *Education and Social Justice* (pp. 1-12). Dordrecht: Springer.



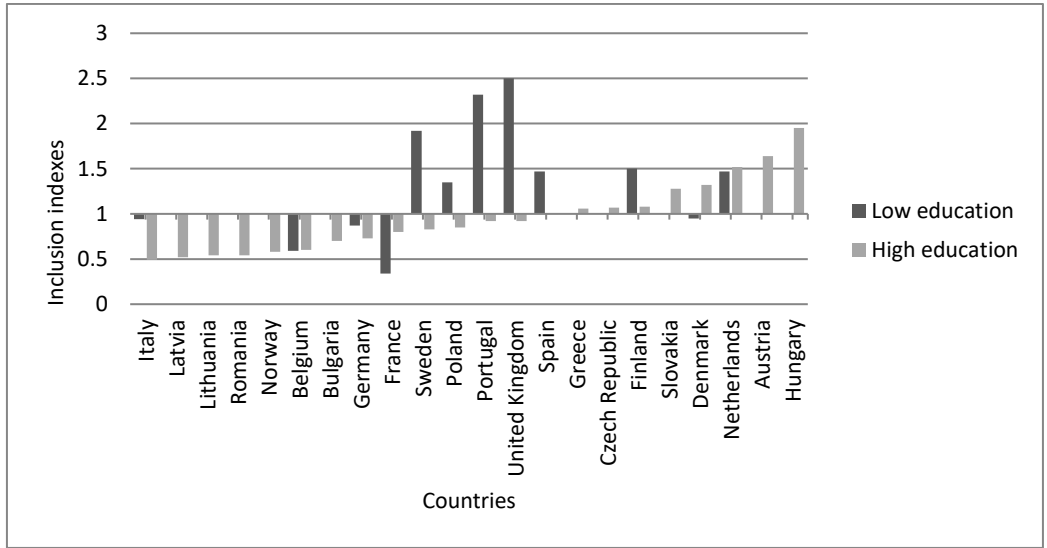
**Figure 1.** Participation rate in formal education by educational attainment level and by countries in 2007.

Source: Eurostat. Data code: trng\_aes\_102.



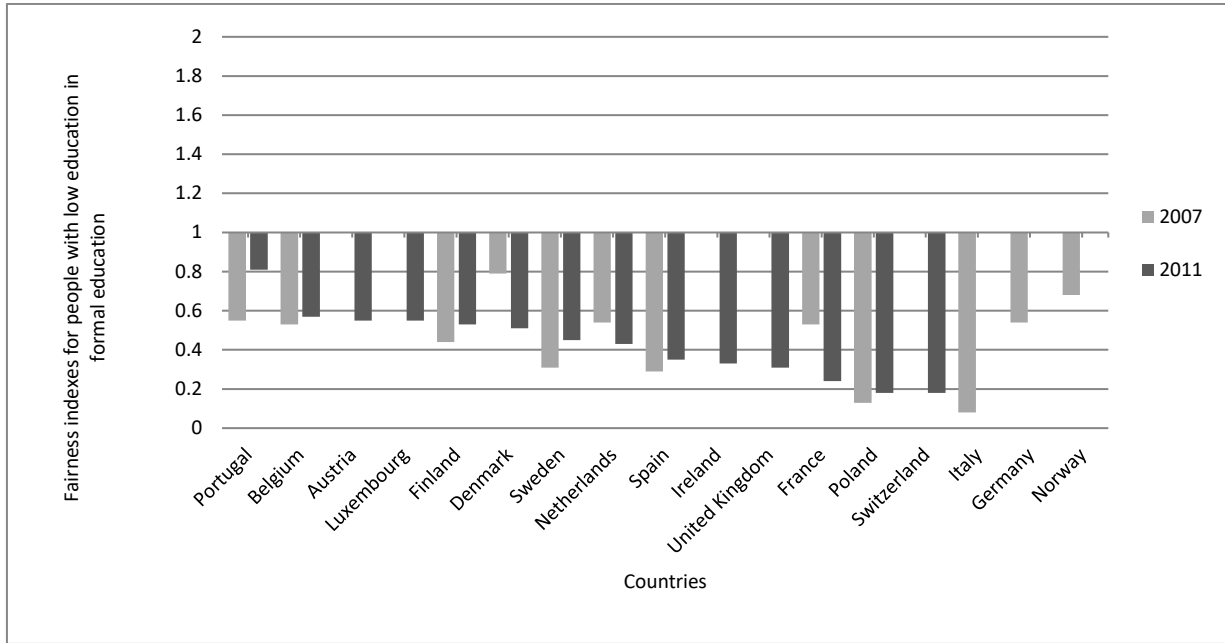
**Figure 2.** Participation rate in non-formal education by educational attainment level by countries in 2007.

Source: Eurostat. Data code: trng\_aes\_102.



**Figure 3.** Indexes of inclusion in participation in adult formal education 2011/2007 for people with low and high education.

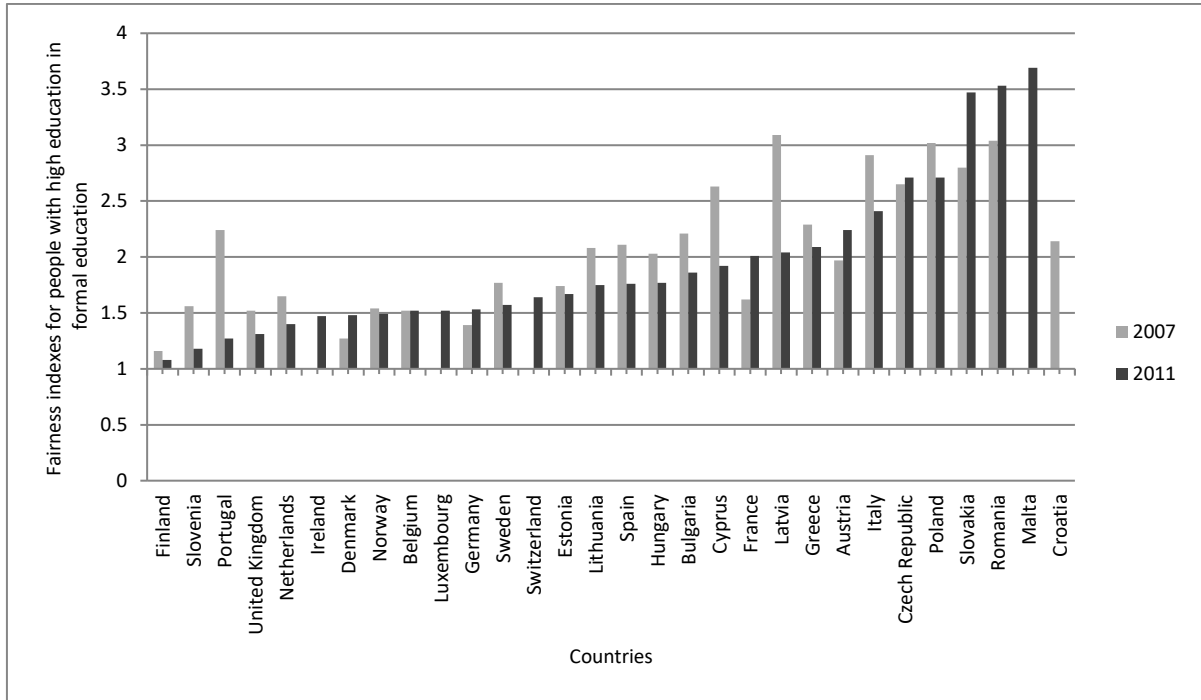
Source: AES 2007; 2011 (own calculations, weighted data – coefindw for 2007 and respweight for 2011).



**Figure 4.** Fairness indexes of formal education for people with low education.

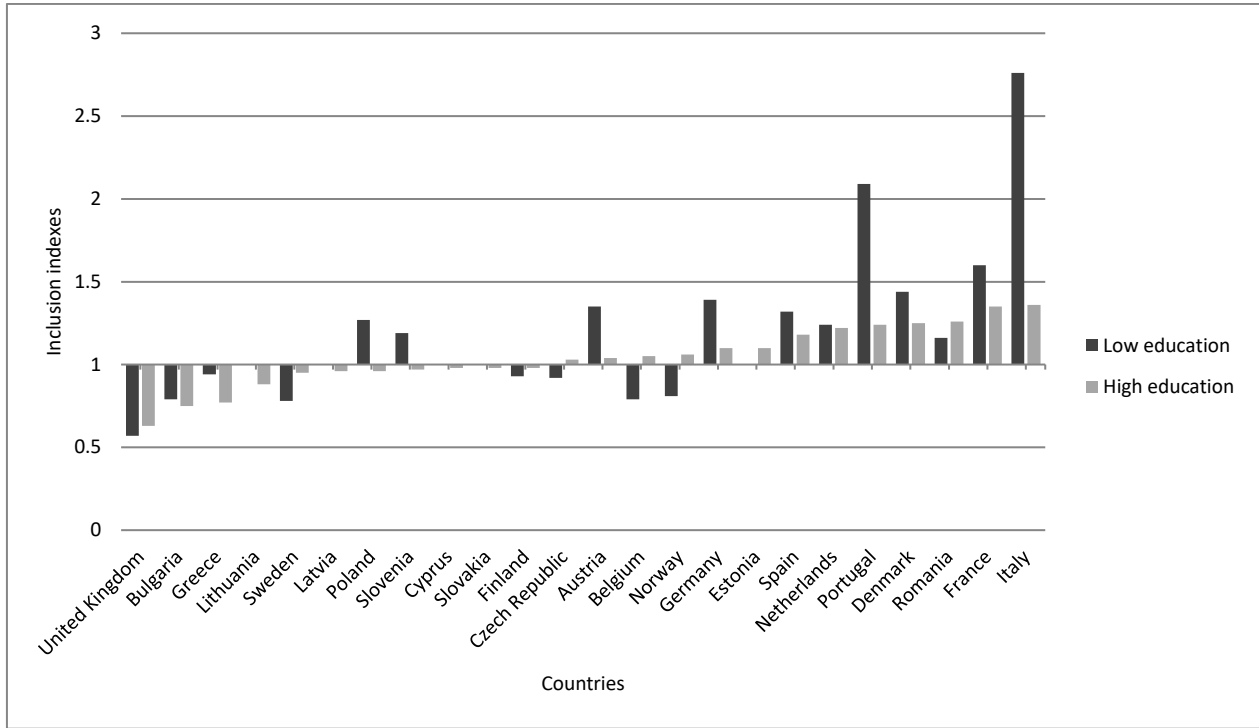
Source: AES 2007; 2011 (own calculations, weighted data – coefindw for 2007 and respweight for 2011) & Eurostat, data for 2007 and 2011 extracted on 10.04.2016, code: edat\_lfs\_9903.





**Figure 5.** Fairness indexes of formal education for people with high education.

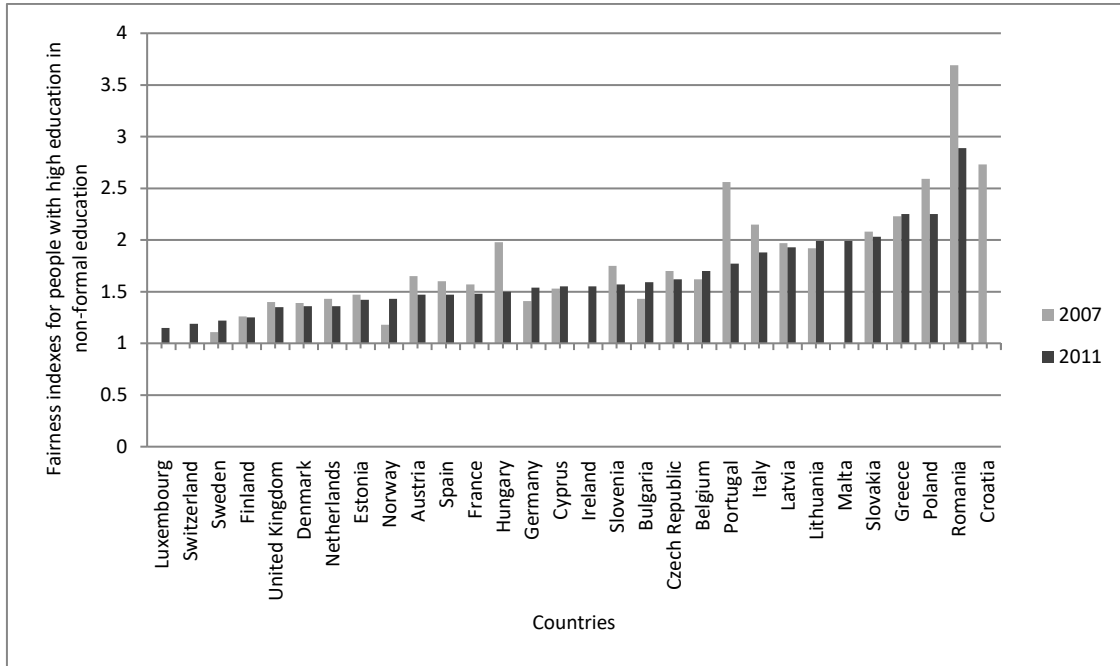
Source: AES 2007; 2011 (own calculations, weighted data – coefindw for 2007 and respweight for 2011) & Eurostat, data for 2007 and 2011 extracted on 10.04.2016, code: edat\_lfs\_9903.



**Figure 6.** Indexes of inclusion in participation in adult non-formal education 2011/2007 for people with low and high education.

Source: AES 2007; 2011 (own calculations, weighted data – coefindw for 2007 and respweight for 2011).

Note. We excluded Hungary as an outlier. The index for low education was 10.43, whereas for high education it was 3.62.



**Figure 8.** Fairness indexes of non-formal education for people with high education.

Source: AES 2007; 2011 (own calculations, weighted data – coefindw for 2007 and respweight for 2011) & Eurostat, data for 2007 and 2011 extracted on 10.04.2016, code: edat\_lfs\_9903.