

COMPARATIVE ADULT AND CONTINUING EDUCATION: A GUIDING ESSAY

Regina Egetenmeyer

ABSTRACT: This paper provides a guide for developing a research design for comparative studies in adult and continuing education. To that end, a research methodology will be presented that was developed at the COMPALL and INTALL Winter Schools on *Comparative Studies in Adult Education and Lifelong Learning*. Central elements for systematic comparisons in adult and continuing education are (1) the object of comparison, (2) research fields for comparison, and (3) inductive comparative categories. These elements form the reference points for the development of a comparative research question in adult and continuing education. The comparative analysis proposes a three-step approach from juxtaposition to interpretation: step 1 – descriptive juxtaposition; step 2 – analytical juxtaposition; and step 3 – analytical interpretation.

1. Introduction

Since 2014, a consortium of international partners has organised the two-week Winter Schools on *Comparative Studies in Adult Education and Lifelong Learning* in February at Campus Würzburg, Germany. Up to 100 participants join the event each year. A central element of the annual Winter School is that professors from the partner universities¹ participate together with their students (Egetenmeyer, Guimarães & Németh, 2017). They select and prepare students at their home universities from October till January each year.

Whereas the first week of the Winter School is dedicated to studying international policies in adult education and lifelong learning, the second week focuses on the comparison of selected issues in adult and continuing education. Over the years, a comparative research methodology was developed that can be used for comparing adult and continuing education. Although there is a broad discourse on comparative education focussing on schools, the methodological development of comparative adult and continuing education has been limited (Egetenmeyer, 2016b).

¹ See acknowledgements at the end of this paper.

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Since the 2015 Winter School, an edited volume has been published each year as follow-up to the Winter School. These volumes present the results of comparative studies in adult and continuing education (Egetenmeyer, 2016a; Egetenmeyer, Schmidt-Lauff & Boffo 2017; Egetenmeyer & Fedeli, 2017; Egetenmeyer & Mikulec, 2019). The present volume is the fifth issue in this series. Based on the previous volumes, as well as many reflections, discussions, and feedback between the consortium members, the methodology for comparative adult and continuing education was developed. This paper presents guidance for comparisons in adult education. Young researchers may use it as a step-by-step guide for developing their own comparative research design for studies in adult and continuing education.

For further studies of comparative adult education, readers are invited to also follow the online tutorials, which were developed in the COMPALL and INTALL projects.

Online Tutorials for Comparative Adult Education

COMPALL Online Tutorial:

<<https://www.hw.uni-wuerzburg.de/compall/winter-schools/online-tutorial/>>

INTALL@Home Tutorial:

<<https://www.hw.uni-wuerzburg.de/intall/intallhome/>>

This paper is based on these tutorials and the abovementioned publications.

2. Comparison as a daily activity

To gain an understanding of comparative adult education, it makes sense to begin by thinking about the fact that comparisons are a daily activity. Everybody makes comparisons every day, whether explicitly or implicitly. We are aware of some comparisons – and unaware of others. People compare the weather from one day to the next, they compare articles of clothing according to their preferences, meals according to their taste, and products according to prices.

Let's look at two different geometrical figures. We can compare them by shape: we may have a triangle and a rectangle, for example. We can compare them by size: maybe they are small and big. We can compare them by colour: we may have a blue and a red figure. We can compare them by contour: we may have a thick line and a dotted

line. We can compare them by how they move: they may be rotating or swinging. This means that daily comparisons need two prerequisites: (1) They need at least two objectives to be compared. In our example, we looked at two different *figures*. (2) To compare them, we need *categories for comparison*. The categories we used were shape, size, colour, contour, and movement. Based on these prerequisites, we can observe the objects: how do they differ or resemble each other according to the defined categories?

3. Elements of systematic comparison in adult and continuing education

Whereas daily comparisons are frequently made implicitly, systematic research-based comparisons need a critical and detailed reflection of its elements. A precise definition of these elements is the prerequisite for high-quality academic comparisons in adult and continuing education. These elements are (1) the object of comparison, (2) the research field of comparison, and (3) the categories of comparison. These three elements are identified in relation to the research question to be pursued. The reciprocal development of the mentioned elements and the research question is the basis for developing the research design of a comparative study in adult and continuing education.

4. Object of comparison in adult and continuing education

The object of comparison has to be related (a) to the *academic discipline* of adult and continuing education on the one hand and (b) to the specific *practice situation* of the researched phenomena on the other.

The relation to the *academic discipline* refers to the relation of the research object to the knowledge and research results of academic discourse in adult and continuing education. For the development of the research design, it means gaining in-depth insights into the academic discourse about the phenomena. Researchers have to answer the following questions:

- a) In which discipline the study will be integrated?
- b) How can the researched phenomena be understood according to the logic of the discipline?
- c) Which theoretical perspectives are used for understanding the research object?
- d) Which interdisciplinary relations will be taken into account?

It is important to keep in mind that the academic discourse in adult and continuing for many decades developed within close language

boundaries. As consequence, missing links of theoretical and empirical research discourse in adult and continuing education can still be observed between different languages. Based on this fact, it is advisable to reflect critically on the academic discourses and language(s) the study will refer to.

Taking international-comparative research in adult and continuing education as a disciplinary reference point, the research logic can be understood as research about provision and effects in adult education and lifelong learning (Egetenmeyer, 2016a). Existing studies can be broken down into studies about politics and policies in adult education and lifelong learning, about the professional situation in adult education and lifelong learning, about providers and institutions in adult education and lifelong learning, about educational offers in adult education and lifelong learning, and about the learning and competencies of adults.

On the other hand, it is important to understand the specific *practice situation* and reality of the research objective. If adult education starts with the learning of adults, it is important to understand the situation of learning settings for adults. Adult learning may happen in informal learning settings, for instance when reading a book or discussing with friends. It may also happen in non-formal learning settings, for instance when adults attend a continuing education training offered by employers or when they go to an adult education centre to take a gym course. However, adults may also learn in formal learning settings working towards a formal certificate, for instance when pursuing a postgraduate university degree or a high school diploma through second chance education. Educational providers and institutions can support all of these learning activities. This support may be called education provision.

All adult learning activities, learning settings, and institutional frames are embedded in conditions involving more or less support. These supporting and non-supporting conditions include lifelong learning policies, laws, legal frameworks, or the availability of financial resources. Adult learning and adult education, as well as their (non)supporting conditions, are influenced by a framework. This framework includes the historical condition, which understands adult education as an important or non-important activity. The framework is influenced by the demographic situation. But international agreements of the EU, UNESCO, or OECD also have an impact on adult education activities. Likewise, the employment situation has an essential influence on adult learning and educational activities.

For the comparative research design, it is important to understand the research objective based on the theories and empirical results of the discipline and based on the practice situation and reality.

Example:

If a comparative study compares participation in adult education, it is important to study theories and empirical results about participation in adult education. Aside from the disciplinary foundation of the research objective, the practical situation of participation in adult education has to be studied as well. Who are the adults who are taking part? Where do they take part? What are the conditions and frames of adult learners (e.g. biography, employment situation) and of adult education providers (e.g. policies, history)?

5. Research fields of comparison in adult and continuing education

Comparative studies in adult and continuing education examine one research object in a minimum of two different research fields. The research field is the question of *where* the object is researched. The research design is quite different if participation in adult and continuing education is researched at continuing education providers in higher education or at continuing education providers offering courses for unemployed people.

Traditionally, research fields in comparative adult education had a country perspective:

«A study in comparative international adult education [...] must include one or more aspects of adult education in two or more countries or regions» (Charters & Hilton, 1989:3).

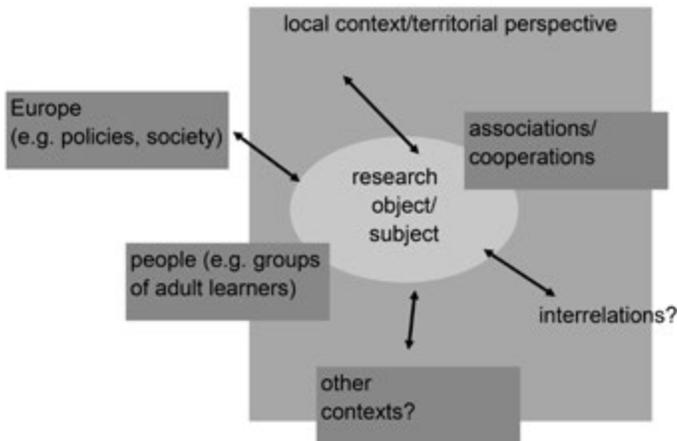
As a consequence, studied compared objectives between different countries.

In this approach, a research objective was understood as integrated into a certain community, which is integrated into a province, which is integrated into a certain country. In this sense, participation in adult and continuing education would be understood as influenced hierarchically by the community, the province, and the country (see Figure 1).

Figure 1 – Country perspective in comparative adult and continuing education. [Source: Author's own]



Figure 2 – Transnational perspective in comparative adult and continuing education. [Source: Author's own]



Due to globalisation and internationalisation, however, it is more useful to understand research objects in adult and continuing education from a transnational perspective (Schriewer, 1993; Varghese, 2017). This means that research objects should be understood in the contexts in which they are embedded (see Figure 2). Consequently, the research objective could be (more) influenced by a transnational context than by a local or country context. Transnational contexts exist beyond and alongside local and country influences.

When observing participation in adult and continuing education, the European strategies towards a European higher education area may be a more influential context than local regulations and policies. Transnational cooperation (e.g. working in an international project) or membership in international associations (e.g. the European Association for the Education of Adults) may create a stronger context than policies on the country level.

As consequence, the research fields in comparative adult education cannot be identified solely or mainly by selecting countries for comparison. Rather, the research fields have to be defined according to the research objective. They have to be reflected critically concerning their contexts. Understanding the contexts of the research fields means identifying supporting and non-supporting conditions and the framework, as outlined in the previous section on research objects in adult and continuing education.

If the transnational perspective is taken seriously, understanding the contexts of the research fields also means identifying common and different contexts of the different research fields.

Example:

A study compares adult education study programmes at the University of Florence and the University of Würzburg. The research fields would be the master's courses in education at the University of Florence and the master's courses in education at the University of Würzburg. Various contexts may be identified; for instance, higher education regulations in Italy and in Germany, as well as regional regulations in Bavaria. Concerning the framework of the research fields, the history of adult education studies in Italy and Germany as well as the different employment situation in the two countries have to be taken into account. Aside from these different contexts (conditions, frameworks), the situation in both research fields is influenced by the European higher education area.

6. *Categories for comparison in adult and continuing education*

Traditionally, categories for comparison in adult and continuing education have been understood as *tertium comparationis*, or the “third of comparison”:

«A study in comparative international adult education [...] must include one or more aspects of adult education in two or more countries or regions» (Charters & Hilton, 1989:3).

In this famous quotation from Charters and Hilton, one or two aspects of adult education are mentioned. In that publication, the aspects or categories for comparison in adult and continuing education were understood as deductive categories. They were developed as external categories, outside the research fields, based on the assumption that they are applicable to all research fields. The deductive categories were researched in country reports (e.g. history, financing, participation, providers in adult education). Typically, this approach understood the comparative categories in a deductive way – that is, the comparative categories were understood as being outside of the research object and the research field.

However, taking the transnational perspective of the research fields into account, the categories of comparison in adult and continuing education cannot be identified as external categories. Moreover, it is necessary to develop the comparative categories in an inductive way. The identification of comparative categories is oriented towards the research object on the one hand and the compared research fields on the other hand. Categories should be identified in a way to enable rich comparisons: which inductive comparative categories can provide a rich comparative research result? Which inductive categories can provide the most valuable answer for the comparative research question?

Example:

A study compares adult and continuing education providers in New Delhi, India, and Lisbon, Portugal. The authors develop inductive categories that give a rich answer regarding the similarities and differences of providers in New Delhi and Lisbon. Maybe the funding bodies, target groups, and educational targets of the providers can serve as valuable comparative categories. If adult and continuing education providers in Estonia and Austria were compared, researchers might have to develop different inductive categories. Possibly, adult education associations or national policies would provide more valuable results for the comparison of providers in Estonia and Austria.

It is advisable to take critical account of the fact that comparative categories create certain lenses through which a research object is focussed. Different inductive categories may lead to different results. Strong attention is needed if adult learners or groups of adult learners are taken into account. If similarities and differences between people and/or groups are considered, we must be aware that comparative categories create a social reality. If people are compared by age, gender, or nationality, people are assigned to socially created boxes. For researchers, it is highly important therefore to reflect on the social realities and consequences their research may create by defining comparative categories.

7. Research question for comparison in adult and continuing education

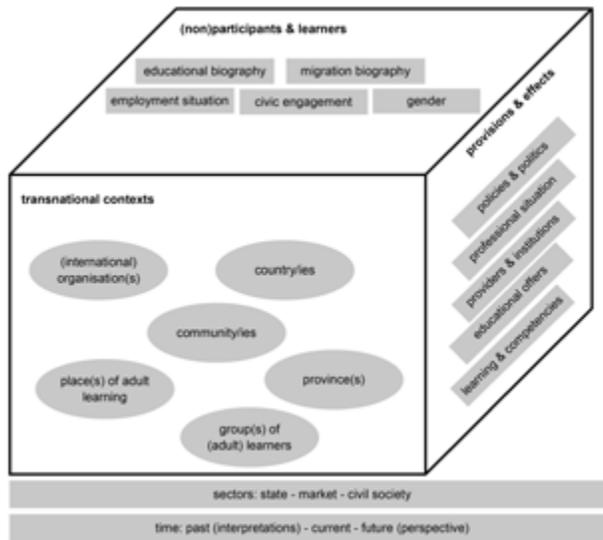
A research question in comparative adult and continuing education asks for the similarities and differences of a research object related to adult and continuing education in two or more research fields. Based on the theoretical, empirical, and practical understanding of the research object and the research fields including their contexts (shared and different conditions and frameworks), inductive comparative categories have to be developed. These inductive comparative categories are oriented towards the richness of the comparative questions. It is important to ensure there are similarities of the research object between the research fields to be able to compare similar objects in different research fields.

For identifying the research question, it may be helpful to use the cube for comparative adult and continuing education.

The research object can be identified from the disciplinary focus (provisions & effects in the cube) and the specific practical situation (participants & learners in the cube). The research fields can be identified from the research object's context conditions (transnational contexts in the cube).

Based on this identification, the research fields are defined and inductive comparative categories are developed, which may give a rich answer to the comparative research question. Those perspectives are summarised in the cube for comparative adult and continuing education (see Figure 3).

Figure 3 – Cube for comparative adult and continuing education. [Source: Egetenmeyer, 2016a]



8. Data collection for comparison in adult and continuing education

The development of the research question, the research object, the research fields, and the inductive categories is followed by data collection. This essay does not provide detailed information on how to collect data for comparative research in adult and continuing education. It rather understands comparative research in adult and continuing education as an additional perspective that has to be taken into account in addition to the methodologies available for theoretical and empirical research in adult and continuing education.

This means the comparative methodology provides additional reflection on data gathering. In general, data collection for comparative adult education can be done by analysing academic discourse, documents (e.g. policy papers), qualitative primary and secondary data (e.g. interview data), and quantitative primary or secondary data (e.g. survey data).

9. *From juxtaposition to interpretation*

For data analysis, this paper proposes a three-step model, which starts at descriptive juxtaposition, moves on to analytical juxtaposition, and ends at analytical interpretation.

9.1 *Step 1: Descriptive juxtaposition*

As a first step, each research field is researched with the aim of gathering rich information for the inductive categories. It is advisable not to develop too many inductive categories at the same time; two or three inductive categories with several sub-categories should be sufficient. This will enable an in-depth study of the research object instead of producing research that only scratches at the surface.

During the process of the descriptive juxtaposition, the inductive categories are further developed and specified according to the richness of the comparison between the different research fields.

Based on the information gathering, a juxtaposition (side-by-side placing) of the inductive categories between the different research fields is performed.

The descriptive juxtaposition asks:

What is similar and what is different regarding the research object between the researched fields?

In a first step, similarities and differences may be identified simply in a descriptive way. It is important to ensure that this step produces enough similarities to prove that the study does not compare apples and oranges. Due to the enormous variety in adult and continuing education in different countries, identifying similarities is a key task. It ensures the development of a joint research community. It is easier to find similarities for abstract research objects (e.g. for learning of adults, policies in adult education) than for concrete research objects (e.g. learning of women with an Indonesian migration background). If similarities cannot be identified, it is advisable to develop the inductive categories in a more abstract way.

9.2 *Step 2: Analytical juxtaposition*

The descriptive juxtaposition is followed by analytical juxtaposition. Whereas descriptive juxtaposition only looks for similarities and differ-

ences between the research fields, analytical juxtaposition asks about the leading idea behind each research field. This is done by mirroring the research fields against each other. The goal of analytical juxtaposition is to understand the research object in each research field according to its inner logic and the background of its contexts (conditions, framework).

The analytical juxtaposition asks:

What is the leading idea and/or logic of the research object in each research field?
How can this leading idea be understood compared to the research object in the other research field(s)?

9.3 Step 3: Analytical interpretation

Only the third step – the analytical interpretation of the similarities and differences – leads to a real comparison. In this third step, the reasons for the similarities and differences are identified and researched. Therefore, the researched contexts (conditions, framework) of each research field serve as the reference points for the interpretation. The result of the analytical interpretation is the formulation of assumptions regarding the reasons for similarities and differences. The formulation of these assumptions shows the depth of the comparison performed.

The analytical interpretation asks:

Why are the research objects in the researched fields similar and different?
What are the reasons for the similarities and differences?

10. Role of the researcher

Even when following a joint methodology and procedure for comparative adult and continuing education, it is important to keep in mind that researchers and their respective background(s) strongly influence research designs in comparative adult and continuing education. Owing to the strong variety in adult and continuing education in the academic discourses of different languages and practical fields, the researcher's personal background has a strong impact on the research objects and research fields they identify. Their knowledge of and (theoretical) perspectives on a research object shape the lens through which the comparative study is per-

formed. Furthermore, local, personal, and language-related restrictions in access and to academic discourses and fields of practice shape comparisons in adult and continuing education. This position of the researchers needs critical reflection (Lange & Parreira do Amaral, 2018).

The research fields selected for comparison may also play different roles. If a German doctoral student compares adult education policies in Germany and Italy, their insight into the German research field may be deeper and broader. As a consequence, the Italian research field may take on the function of mirroring or contrasting of the German situation (Schriewer, 2000). As a consequence, the analytical interpretation and comparison may lead to a new and deeper understanding of the German case.

How do we ensure the validity of research in this very *flexible model* of comparative adult and continuing education? The validity of research results is based on the precision and reasoning of the inductive comparative categories (e.g. theoretical reasoning, appropriateness to empirical/practical situation). The data collection follows (empirical) research principles, and the comparison has to be understood as an additional methodological perspective. Regarding the depth of the analytical interpretation, a creating validity through communication is the advisable approach. This means exchanges and discussions with international researchers in the field. Furthermore, comparative research in adult and continuing education should be understood as a contribution to a research community. A comparison is (only) one contribution to understanding the research object in one specific way. The outcomes have to be interrelated with other studies in the field.

The goal of comparative research in adult and continuing education is not to reach a final understanding of a research object in a different field. Moreover, comparative research in adult education should support researchers in becoming more aware of and sensitive to the challenges and boundaries of each other's understanding. It should support the awareness of one's own perspective. Comparative research in adult and continuing education may lead to a better understanding of one's own perspective by contrasting it with other perspectives. Ideally, it may lead to a personal attitude of 'constantly trying' to understand each other with personal effort. This cultivation of a comparative attitude may include also emotional and cognitive aspects of non-understanding.

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