

Introduction to the Handbook

This Handbook aims to provide its readership with a wide-ranging frame of reference for researching adult and lifelong education and learning, in varied geopolitical and social territories across the world. It has been possible thanks to a collaborative effort involving, over a three year period (from concept to publication), seventy-one established scholars and newer researchers from Africa (six), Asia (eight), Europe (twenty-six), Latin America (four), North America (nineteen), and Oceania (eight).

Its premise is that adult education, adult learning, lifelong education, and lifelong learning are entangled activities that have differentially captured academic, political and practical attention over time and space. As a result, time and again scholarly work concerned with the education of adults and the learning that happens in adulthood treats these activities as either synonymous or distinctive. This frequently results in intangible conceptual tensions between adult education, adult learning, lifelong education and lifelong learning, which affect the very object of academic enquiry, and its investigation.

A wide range of disciplines has, of course, helped address the cognitive, physical, social and political dynamics and processes of education and learning that occur in formal, non-formal and informal contexts beyond schooling. Thus the scholarly literature on adult education, adult learning, lifelong education, and lifelong learning is extensive. It includes key reference books that in recent years have gathered together diverse contributions in an attempt to redefine the contours of what has been for a long time a delimited field (i.e. adult education), in the light of developments in cross-related areas of studies (i.e. adult learning, lifelong education, lifelong learning). Such texts include among others: Kasworm, Rose & Ross-Gordon, 2010; Wilson & Hayes, 2010; Findsen & Formosa, 2011; Jarvis, 2012; Aspin, Chapman, Evans & Bagnall, 2012

Yet we (the Editors) perceived a gap in the literature for a reference book that explicitly approaches the inner tensions between adult education, adult learning, lifelong education, and lifelong learning, especially one that is sensitive to the multiple disciplinary heritages entrenched in researching the education and learning that occur in adulthood. This collection seeks to combine discipline-based theoretical perspectives, examining their influences on, and the contaminations they bring to, researching the education and learning of adults, and also the frictions and dilemmas these present. Last but not least this book seeks to exemplify the international dimension in researching education and learning in formal, non-formal and informal contexts beyond schooling.

Accordingly, three central questions guided our design of this Handbook:

1. How is the field of adult and lifelong education and learning being understood and conceptualised by research in the twenty-first century? What theoretical frames are researchers drawing on and why?
2. How are researchers locating and representing their work within the diverse descriptors of the field and the tensions between these terms – for example, adult

education, lifelong education, lifelong learning, adult learning and lifelong learners? How are these understandings related to the ontological and epistemological positions of researchers, and their global positions?

3. What disciplinary traditions and practices are researchers drawing on and how are these traditions, bodies of knowledge or practices informing the questions and issues researchers consider important or the dilemmas and challenges their research is focused on?

From the outset we envisaged a loose structure for this Handbook. This, we considered, would best tease out the richness of diverse scholars' insights, as they engage with one or more of these questions from their own conceptual, methodological, disciplinary and geographical positions.

As Editors, we have tried to overcome mainstream and cultural-related attitudes and assumptions, and have benefitted from the invaluable support of our international Editorial Advisory Board: Prof Tonic Maruatona (Africa), Prof Weiyuan Zhang and Prof Helen Bound (Asia), Prof Andreas Fejes (Europe), Prof Timothy Ireland (Latin America), Prof Emeritus Tom Nesbit and Prof Emerita Amy D. Rose (North America), and Prof Richard Bagnall (Oceania). Undoubtedly the active engagements that we, and members of the Editorial Advisory Board, have with scholarly journals in adult education, adult learning, lifelong education, and lifelong learning, have proved a rich resource.

Together we identified more than a hundred potential contributors, whose research is well known in national or international academic communities, and draws on, and at times combines, different disciplinary knowledge, or expands our understandings in various ways. But while we invited these colleagues to contribute, we must recognise the limits of what is possible.

One such limit is language. Language shapes the way we appreciate and communicate about research. This was envisaged as a book to be published in English, so even when English was not their first language, it was important that contributors were proficient and willing to write in English, or able to have their contributions well translated. Despite our efforts, therefore, out of sixty-five authors of individual or collective chapters included in this Handbook, half are based in the Anglophone world (Australia: seven; Canada: six; New Zealand: one; the United Kingdom: eight; the USA: eleven). However, the other half is not. Among contributing authors outside the Anglophone world, the vast majority work in a country where English is a foreign language (Argentina: one; Belgium: one; Brazil: two; Bulgaria: two; China: one; Denmark: three; Finland: one; France: two; Germany: one; Malta: one; Italy: two; Palestine: one; Spain: one; Sweden: three), though a few are based in countries that, due to past colonial ties, still recognise English as an official language (Botswana: three; Ghana: one; Hong Kong: one; Philippines: one; South Africa: one; Singapore: three). If this Handbook had been designed for publication in Mandarin Chinese or Spanish, just to mention the two most spoken languages in the world (other than English) (Lewis, Simons & Fennig, 2016), it would no doubt convey rather different frames of reference for researching adult and lifelong education and learning.

Knowledge is, of course, never value free; neither is any reference book aimed at defining and bordering a vast area of academic research across geopolitical and social territories. Language conditions how we gain access to and disseminate research, but a number of other factors also influence how knowledge is produced, and thus contribute to shaping the boundaries of a field of academic enquiry.

In the social sciences, as Sartori (1984: 16) notes, the accumulation of knowledge, as well as the stability of language, depends on the terms used, because language not only expresses, but also moulds our thought. On this line of thinking, ‘allocating a term to a concept – terming the concept – is a most central decision’ (Ibid.).

We intentionally defined the field of academic enquiry covered by this Handbook as *adult and lifelong education and learning*. This phrase, composed of words we selected and grammatically linked to one other, is unusual in the specialised literature. More common are combinations of two of the words (adult education, adult learning, lifelong education, lifelong learning), or phrases that grammatically link at least three such words (e.g. adult *and* lifelong learning, adult learning *and* education, education *and* lifelong learning, adult education *and* lifelong learning).

It was not our intention to predetermine the boundaries of a field of academic enquiry in which we position ourselves. Rather we wished to permit more stable allocations of terms to concepts in order to unleash the potential for a collective rebounding of the field. Hence we acknowledge that the result of our collective endeavour is only one possible rebounding that might have been possible - yet we believe, it has been fruitful for the accumulation of knowledge on cognitive, physical, social and political dynamics and processes of adult and lifelong education and learning.

Nonetheless, we purposely described this collective redrawing of boundaries in terms of *research on* (not *in*) adult and lifelong education and learning, for two main reasons. First, we felt that there are already many valid resource books for practitioners willing to increase their knowledge on how to teach, or create the conditions for learning, that address adults in formal, non-formal and informal contexts. As we write, we know more are under preparation by professional organisations that represent practitioners (at least in the Anglophone world). At the same time, we note that the number of university chairs and specialised undergraduate and graduate programmes in adult education have been reducing in number; in some countries, they have disappeared entirely. Hence both newer and more established scholars in the field face some difficulties in gaining access to, and disseminating, knowledge gained through research in their own countries and elsewhere. Second, the richness and complexity of adult and lifelong education and learning as a field of academic enquiry almost defies attempts to be thoroughly analysed or fully represented in this or any other Handbook (no matter its length).

We hope that despite these limitations, this Handbook contributes new knowledge and understandings derived from research on adult and lifelong education and learning in various parts of the world. We therefore hope that it will be of value to undergraduate and postgraduate students. However, it is equally our hope that the Handbook will stimulate further research by newer and more established scholars who share an interest in how the education and learning of adults in contemporary societies is affected by socio-cultural, political and economic globalisation processes. Regardless

of their geographical location, undergraduates, postgraduates and newer and established academics need to understand their relationship to these knowledge producing processes in the field of adult and lifelong education and learning. And arguably, we hope this Handbook will also encourage researchers to rethink questions of equity and fairness and the sustainable prosperity of individuals, their immediate communities, and societies at large.

Handbook overview

The structure of this Handbook is the result of inductive inferences (Polkinghorne, 1983) that we made, reading and discussing time and again each of the chapters submitted for publication, in editorial communications and exchanges between the authors, and with our Editorial Advisory Board. In doing so, we built on our knowledge of the field. Yet, while looking at possible interconnections and cross-references among the chapters, we abandoned the apparent certainties of our original categorisation. Initially, we had intended to distinguish between three conceptualisations: firstly, learning in adulthood and learning systems; secondly, understandings and knowing about learners, educators and learning; and thirdly, dilemmas and challenges. Whilst the Handbook does provide chapters that focus on these three sets of ideas, and the ideas can be searched for using the index, we have not used these concepts as the organising structure. Instead, we adopted a different organising rationale, drawing on human geography as a powerful metaphor for depicting the territory of research on adult and lifelong education and learning.

Since the new millennium, as Storey (2015) points out, there has been an increased interest among scholars of human geography in the social and political contexts of how we understand a territory and issues of territoriality. Traditional understandings of a territory as the spatial extend under the jurisdiction of a state, and of territoriality as a state strategy to create a sense of ownership over such territory, and act for its (material and ideational) defence (Dahlman 2009), have been both revisited and expanded. For instance, Delaney (2005) stresses that territories are not simple bounded spatial entities, but rather the result of a mix of power, ideology and authority. Thus, territoriality is entrenched in social practices and processes that blend space, power and meaning. In this line of thinking, Storey (2012) speaks of various territorial strategies applied to affirm, keep or oppose power in diverse social and political contexts, and of different territorial practices that can strengthen, support or contest diverse forms of exclusion.

Metaphorically, we see educational research as a territorialised world, of which differentiated areas of research are observable manifestations. Yet the production of distinct spaces for the creation, dissemination and accumulation of academic knowledge implies the production of distinct territories within the world of educational research. As such adult education, adult learning, lifelong education, and lifelong learning can be seen as the resultant of territorialisation processes that occur at the micro-scale, where each is produced as a bounded space claimed by group of academics, practitioners and policymakers, jointly or on their own terms. Yet, in human geography, as Storey (2015) notes, the concepts of territory and territorialisation simplify and limit complex phenomena that involve particular ways of thinking about or imagining space— in the service of specific political functions.

Similarly, we imagined this Handbook as a bounded space or territory to serve as a reference book for newer and established scholars. The contours of this territory are represented by the three ‘spaces’, or parts, of this Handbook.

Part I, **Thinking and Rethinking the Field**, has probably the least self-explanatory title. We hope this implies that territorial borders are not fixed or defined once and forever at the conceptual level. The section *Theoretical Landscapes* presents collective theoretical frameworks of reference in adult education and learning in which the pioneering work of a few scholars have been further developed by others, and constitute today well-established and recognisable theories and/or theoretical perspectives. The section *Generative pathways* comprises original conceptualisations and theorisations that selected scholars have developed over their lifetimes, either in solitude or in collaborative efforts with others, in order to make sense of specific concerns and research areas. For the most this work draws on different traditions and/or disciplines, but always adopts critical, self-reflective, and personal lenses. Finally, the section *Conceptual Sites* depicts political economic influences and tensions in re/thinking adult education and learning, which we see as just one ‘site’ within the larger landscape of adult education and learning research, but to which - for its contemporary relevance - we pay particular attention here.

Part II, **Scale and Movement**, suggests that at the socio-cultural and political levels, there are distinctive territorial borders, depending on the scale on which we focus attention. At the same time, it recognises the permeability of such boundaries. These become especially evident when we take into account the flows of people across geographical borders, and the ideas and capacities they carry with them. Accordingly, the *Global* section deals with research on issues such as, the sustainability of the world we inhabit and the social injustices that persist within it, but also on the work of intergovernmental organisations, and their discourses on adult and lifelong education and learning. It also reflects on how different research patterns within the field capture what goes beyond national borders. The *Regional* section brings to light how different territorialisation processes – that build on countries’ political alliances and/or cultural proximity – frame the research on adult and lifelong education and learning. Similar processes, however, also occur in territories that correspond to spaces of state jurisdiction in South America, Asia or the Middle East, as depicted in the *National* section. Finally, the *Transience* section questions the territorialisation processes that build on the geography of territories, addressing the conceptual and practical dilemmas these raise.

Finally, Part III, **Contexts, People and Practices**, concentrates on the collective and individual actors whose power, ideology and authority contribute to the creation of territories as bounded spaces for the education and learning of adults. But in so doing, it pays equal attention to inanimate and often silenced phenomena that play strategic roles in creating a sense of ownership over the territory of adult and lifelong education and learning. The section *Organisations* looks at study circles, popular universities, universities, enterprises and academic publishing as non-spatial dimensions of education and learning territories. The *Learners* section looks at other non-spatial dimensions, exploring some characteristics of particular adult learners, such as their age, disabilities and sexual orientation. Finally, the section on *Technologies, Objects & Artefacts* further expands on the non-spatial dimensions that contribute to territorialisation processes, from the information and communication

technologies that brought Massive Open Online Courses or Open Education Resources to centre stage to arts, fiction, and popular culture. Such bounded spaces may function as new or alternative territories for adults' learning and education.

Short introductions to Parts I, II and III present in greater detail the work that each embraces.

How to use this Handbook

Likewise any other Handbook, people may choose and read selected chapters or sections according to own interests. But there are also many other pathways to read through this Handbook, among which we here point at just a few.

People willing to delve into the **epistemic complexity** of adult education, adult learning, and lifelong education and learning, may start by reading Richard G. Bagnall and Steven Hodge's epistemological analysis (ch. 2), then read about the learning turn in Terri Seddon's contribution (ch. 3), to conclude with reading about the conceptual relations between learning and education in Palle Rasmussen's chapter (ch. 4).

Readers attentive in issues of **social inclusion and justice** may go through the contributions on people with disabilities by Jovita M. Ross-Gordon (ch. 5), and on the complex lives of lesbian, gay, bisexual, transgender, queer, intersex, and ally by Matthew E. Eichler and Racidon P. Bernarte (ch. 6), to continue with the contribution on older adults by Brian Findsen (ch. 7). They may also read forward on the social injustices of participation in adult literacy programmes, in Lyn Tett's contribution (ch. 8), and consider equity issues connected with participation in adult learning and education, thanks to the contribution of Kjell Rubenson (ch. 9). Finally, they may question whether Massive Open Online Courses (MOOCs) really democratise participation, as does Sarah Speight in her contribution (ch. 10). Yet, readers interested in the empirical studies on lifelong learning, may also consider the heuristic potential of the capability approach in conceptualising lifelong learning, with the contribution of Pepka Boyadjieva and Petya Ilieva-Trichkova (ch. 11).

People willing to delve into more **critical turns and perspectives** may read the chapter on the critical turn in human resources development by Tonette S. Rocco, Sunny L. Munn & Joshua C. Collins (ch. 12), and the chapter on transformative sustainability education by Elizabeth A. Lange (ch. 13).

Those with an interest in **African countries** may start with the contribution of Michael Tagoe on the historical relation between adult education and social movements in Ghana (ch. 14), then read Idowu Biao and Tonic Maruatona's contribution on the challenges and prospects for lifelong learning in the Southern African Development Community (ch. 15), to conclude with a focus on the role of open educational resources and indigenous learning for Africa's older adults, as presented by Rebecca Nthogo Lekoko and Keitseope Nthomang (ch. 16).

People attentive to adult and lifelong education and learning in **Latina America** may initiate their reading with the contribution of Danilo R. Streck and Cheron Zanini

Moretti (ch. ?) on the dialogue between Adult and Popular Education in Latin America, then read about the Argentinean debate between Lifelong and Popular Education in the contribution by Lidia Mercedes Rodriguez (ch. ?), to finally reflect on the relevance of Paulo Freire's work today, thanks to the contribution by Emilio Lucio-Villegas (ch. ?).

Far more reading pathways through this Handbook are of course possible. No matter the one(s) one chooses, we wish for an enjoyable reading that can stimulate thoughts, and further research on adult and lifelong education and learning.

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