

# World Trends in Adult Education Research

**Report on the International Seminar on World Trends in Adult Education Research,  
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## Introduction

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Following a decision of the General Conference of UNESCO (26 C/5 01334), the UNESCO Institute for Education was asked to produce, in cooperation with Member-States as well as with other cooperation agencies, an analysis of world trends in educational research on adult education. The objective was to strengthen the impact of educational research on the development of adult education and adult basic education, and to assess the present and possible contribution of universities and other research centres to such development.

UIE approached partners to undertake, in cooperation with the Institute, the work of preparing, organizing and reporting of the five regional operations comprising the project. The five regions were: **Africa, Arab States, Asia, Europe (comprising Western E., Eastern E. and North America) and Latin America**. In each region key researchers and key institutions were asked to analyze current research trends and, if possible, organize a regional workshop.

The **African** study was prepared by the Department of Adult Education of the University of Ibadan (Nigeria) through the organization of a regional workshop in December 1993. In the **Arab States**, Mr Hashim El-Safi Abuzeid from UNEDBAS (UNESCO's Regional Office for Education in the Arab States) was asked to collect the relevant data and prepare an analysis of regional trends. In order to prepare a similar analysis for the **Asian** region a regional workshop was held in February 1994 in collaboration with the Indian National Institute of Adult Education (NIAE). In the **(Pan-) European** region, the Institute co-operated with the European Society for Research on the Education of Adults (ESREA), taking advantage of its "state of the art"-study on the development of adult education research in both Western and Central/Eastern Europe. The regional European analysis was completed by a study of research trends in Canada prepared by *L'Institut canadien d'éducation des adultes* with the collaboration of the Canadian Association for Adult Education. The **Latin American** survey was prepared in cooperation with OREALC (UNESCO's Regional Office for Education in Latin America and the Caribbean) and its REDALF network, the Brazilian National Institute of Educational Research and the Mexican Centre for Educational Studies.

These regional inputs led to an international seminar where world trends were assessed and the recommendations from the regional meetings were reviewed and developed further. Participants at this seminar were the authors of the regional studies and synthesis reports, selected authors of national reports and a group of experts with special experience in international adult education research.

### Structure of the Report

This document presents in three sections the contributions prepared for the concluding international seminar on World Trends in Adult Education Research held in Montréal, 6-9 September, 1994.

The first section includes two conceptual analyses of trends and prospects in the field of adult education research and the implications for a future research agenda.

The second section consists of the regional studies which were prepared in the framework of this trend analysis, enriched by selected national analyses. In alphabetical order it starts with the two contributions from Africa: the report on the regional African workshop and an analysis of the South African situation.

The study on the Arab region is followed by the three-part Asian contribution: a) the synthesis report of the regional workshop; b) a reflection on the South-Asian (in fact mainly Indian) perspective regarding a future research agenda; and c) a national analysis from the Philippines. The (Pan-) European survey is also divided into three parts: a regional analysis on the Western European situation, one about Central and Eastern European countries and a study on Canada. Two regional analyses finally present the Latin American picture.

The final third section consists of the synthesis report of the Montréal seminar.

Note: This document, though five years old but recently revised, has never been published except in an abridged version (*Adult Education and Development* 45, 1995, IIZ-DVV, Institute for International Cooperation of the German Adult Education Association, Bonn, Germany). Because of its uniqueness as an overview of adult education research, we decided to print it in a limited edition for research networks and libraries.





## Research in Adult Education - Current Trends and Future Agenda

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### 1. The Scope of this Paper

1.1 This paper attempts to identify some of the important characteristics of research in adult, including adult basic education, worldwide since the 1976 UNESCO Recommendation on Adult Education, and particularly in the decade since the Fourth International Adult Education Conference (Paris 1985).

1.2 The analysis requires a consideration of gaps and unfilled needs research. Gaps in terms of the kinds and processes of research - purposes, ownership and control, methodology, partnership and collaboration, utilization - may be as important as, or more significant than, gaps in the subject areas covered.

1.3 An analysis of the issues and tensions thus identified in current adult education research should point to an agenda for the period after the Fifth UNESCO International Conference 1997. This might be proposed to the Conference and if endorsed serve as a basis for support for some new research priorities and directions.

1.4 The paper also comments on the impact of research on adult education practice, and on the present and possible future contribution of universities and other research centres. First it is necessary to clarify the central concepts and terminology, and so the scope of the subject-matter of this paper.

### 2. Terminology and Concepts

2.1 I use the term adult education (AE) in a broad encompassing sense to cover all the processes and activities having to do with the education and learning of adults; and thus with the same generously eclectic intention as the 1976 Recommendation. I regard 'AE' nowadays as interchangeable with 'continuing education, (CE)', while recognizing that both of these terms have more particular, narrow connotations: each is treated at times as a subset of the other.

2.2 While including adult learning as an important part of the subject and concept field, it is important not to confuse learning with education. There is a 'democratic' tendency to substitute 'learning' for 'education' out of a wish to be 'learner-centred'. The problem is that this depoliticizes the field and threatens to remove a large area - equity, resource allocation, the political economy of adult education - from the research and policy agenda.

2.3 There is another set of terms and concepts important to our field. These overlap with adult education but can be distinguished by their wider through-life reach, since they relate to the whole educational policy spectrum. None the less they have particular salience for adult education. Although they have grown up mainly in the wealthy nations they are becoming increasingly important globally. Fittingly, therefore, UNESCO as well as OECD and the Council of Europe has contributed to their formulation. They include lifelong education and lifelong learning, *éducation permanente*, recurrent education, and increasingly of late, the learning society and also the learning organisation.

2.4 Central to these terms is the recognition that (a) in a rapidly changing world education cannot be a once-only pre-experience phenomenon (b) learning is highly context-specific. Learning must continue throughout life, supported periodically by education. Learning to learn is therefore an important part of the initial curriculum. In principle the concept of 'the learning society' is the largest encompassing framework for setting an AE research agenda. It is the title of a new British ESRC (Economic and Social

Research Council) Initiative, the substance of which appears very broad, although its practical interpretation could prove to be quite narrow.

2.5 The important point about the concept field and scope of adult education is that it is necessarily broad, diffuse, multi-locational in terms of research sites and academic identities. It reflects the diffuseness and weakly bounded nature of adult education (and learning) itself. An agenda for future AE research needs to recognize this and to be generously open in its definitions and boundaries, encouraging various partnerships and forms of collaboration between different disciplinary researchers, and between researchers and providers of adult education.

2.6 There are two further possible sources of difficulty. First, adult education is a field of research inquiry and of practice, but not an academic discipline. Separating it out and 'professionalising' it tends to restrict the potential to generate needed research, and may reduce the scope and value of the research agenda - for instance by drawing artificial lines between the learning and teaching of young and older people.

2.7 Secondly, the university, as a prime location of research has become problematic with the diversification of university models and types, and with the trend towards mass higher education in many national systems. 'Teaching only' universities may be unable to contribute to AE research in conventional ways. On the other hand, given the distinctive features of much AE research, they may offer research sites (many of the students are post-experience adults for example and their orientation tends to be more practical and utilitarian) and opportunities for kinds of research in AE different from that likely to be attempted in traditional universities.

### 3. Trends and Gaps

The first question might naturally be which subject areas have attracted the energies of AE researchers in the past decade. Comparison of the findings of the regional seminars should enable the international seminar to compare trends. Here, only some broad issues need to be established.

The research which is known and recognized is that which finds its way into the main national and international journals and into leading textbooks and adult education book series. A content analysis of journals would suggest two main strands and styles or traditions: the philosophical, critical, and often politically informed discussion and analysis of the social purposes and functions of adult education; and the study of adult learning processes, instructional and curriculum design and innovation, delivery methods etc.

The first of these is broadly philosophical-political in character, holistic in approach, concerned with AE in its social and political setting. It may be exhortational, based in values or ideology rather than grounded in empirical research. The second is technical-professional. Although the learner-in-context may be acknowledged, the larger socio-political setting, and the political economy of adult education, attracts rather little attention. Self-directed learning is a central and characteristic interest. The first of these tendencies is broadly sociological, the second more characteristically focussed on the individual, and so psychological. Historical AE research belongs rather to the first of these but is by its nature formally speaking disassociated from contemporary policy and practice.

Given the wealth of the United States and its salience in the production and publication of research worldwide, the dominant current priorities for AE research in the USA tend to have a powerful influence internationally. The dominant US AE research paradigm is of the second of the two kinds identified above. This corresponds with a tendency to professionalize AE research, especially though not only in American universities, in a quest for academic stature.

The period since the 3rd International AE Conference (Tokyo 1972) has seen the emergence of 'participatory research' (PR) in adult education, led especially by the International Council for Adult Education (ICAE). The emphasis is on the mobilization and empowerment of ordinary, especially oppressed, people, or communities, through the creation, ownership and use of research. The intention is to demystify research and to place it in the hands of those who are normally the researched.

Participatory research raises questions about what is properly called research. Is it only that which is publicly disseminated by means of publication? Or is community empowerment and action a valid research output? PR also poses questions about research ethics which are encountered in the social sciences generally, but which present themselves with particular force through the questions PR raises about the generation, ownership and use of research, and about subject- object relations in research 'partnerships'.

The principles and methods of PR can be shared through professional meetings, but the knowledge generated is likely to be highly localized and context-specific. We can look at other forms of AE research and inquire how far this too is local, or parochial, in its scope of reference and subsequent accession by others.

Language of publication constitutes one barrier to access: work not published in English tends to be 'trapped' in a particular society, giving work generated in English-speaking societies an exaggerated salience. At the same time it is noticeable how often research published in the largest producer country, the USA, is restricted in its citations to other North American literature only.

Loosely connected to this 'parochialism', there are still few sustained and effective international research partnerships, perhaps because of the applied, practical orientation of most commissioned and other AE research. The barriers to partnership are cultural and contextual, as well as practical in the sense of the low level of AE research and the costs of sustained international collaboration. On the one hand AE and AE research is pulled towards pressing, short-term, practical problems. On the other hand the values informing AE are universal, including the valuing of internationalism itself.

There have been calls, by UNESCO and others, for more sustained longitudinal research as well as for more comparative international study. For similar reasons, longitudinal studies remain scarce, and represent one of the most serious gaps.

Finally, especially in a UNESCO context, one would expect a long-term research agenda which studies the relevance of AE to and its engagement with critical issues in the 'global problematique' to do with social and technological change, environmental degradation, demographic pressures, and problems including ageing, the circumstances of migrants and refugees, economic crisis, militarism, gender, ethnic and other inequalities. It is not evident that AE research has moved any closer to engaging with such questions as these in the past decade.

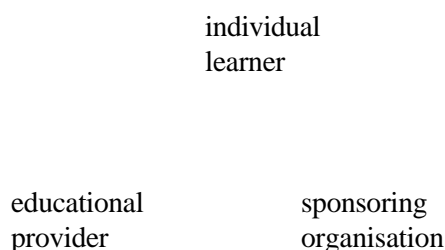
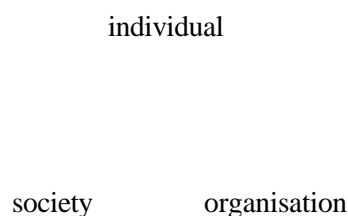
#### 4. Some Key Issues and Tensions

Implied in an analysis of trends and gaps is a set of tensions inherent in AE research. These need to be identified and considered if any future agenda is to be realized.

One concerns the **ownership and the control of the research**. At one extreme community activists, perhaps based in a university or research institute, may set out to mobilize local communities through a PR process. At the other extreme a government or large enterprise may commission research to meet its own organizational needs. The army for instance might commission work on adult learning and the training of its personnel.

**Resources for AE research** are generally scarce and highly compartmentalized in terms of their source and purpose, reflecting the weakly bounded, fragmented and eclectic field of AE itself. The larger sources of AE research funds may be largely unnoticed, being locked into the internal budgets of enterprises in areas of high technology and rapid change such as telecommunications.

Another tension concerns the **relationship between the adult learner, the adult education provider, and the sponsor of AE, or AE research**. It resembles (but does not necessarily always correspond with) a another triangular relationship: between the individual, the society, and various intermediary bodies such as employer organizations. (We noted above that we now talk of learning societies and organizations as well as individuals.)

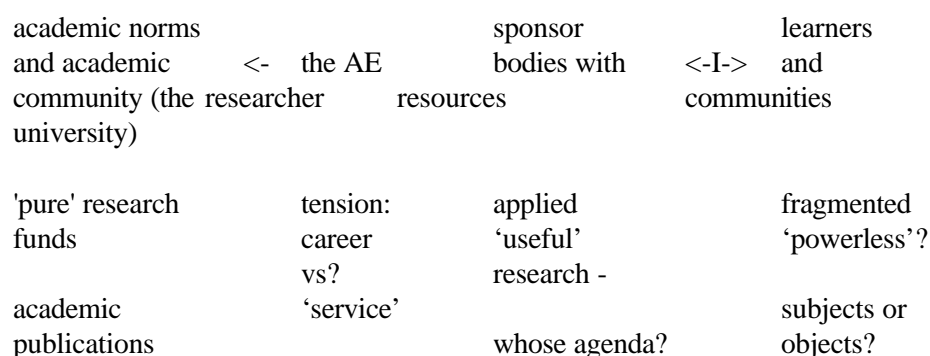
**diagram one****diagram two**

Thinking similarly about research in AE, there are tensions about who determines the research agenda, who commissions and controls the research, who does the research work, and who makes what use of the results.

In AE itself there is often a **tension between the aspirations and motivations** of the 'sponsored learner' who may not be truly a 'volunteer for learning' at all, and the sponsoring body, often an employer or a government department, which commissions the teaching and determines the curriculum.

Similarly, AE research may be chosen and commissioned by a body which is quite separate from those researched - the learners and their learning experience, teachers and educational institutions or settings. The researcher is then accountable to the sponsor, yet may feel morally and intellectually more bound to the subjects, and to the research issues generated, which may not match those of the commissioning body. In other words we need to recognize **who are the stakeholders in a research situation**, and what pressures they may generate for AE research.

In the case of university-based research, probably still the larger as well as the most public part of what is recognized as AE research in most countries though not perhaps the major part of all research on adults, learning and training, there is the pull of the university, or academy, on the AE researcher, whose identity and career future may depend on winning academic credibility as a social scientist.

**diagram three**

This diagram suggests (<-) the pull towards 'pure' or theoretical, publishable academic research which is experienced by most AE researchers working in universities. It may be resisted to some extent. On the other hand those desiring to enhance the professional and academic standing of AE as a discipline, will naturally incline this way, and away from the more applied, lower status, forms of research.

The third column represents sponsors, other than 'pure science' research councils. These are often government departments or private enterprises commissioning research on AE and adult learners. Here the tension is not so much between the theoretical and the applied as between what researchers might wish to do, and might think it proper and important to do, and what can be paid for.

The research subjects themselves are unlikely at least initially to be given any voice in the matter, the sponsor may serve as an asset, but also as a barrier (<-I->) between researcher and researched. One solution is for learner communities themselves to commission research, perhaps by ensuring that they have control of funds. Some communities themselves restrict researcher access to avoid being exploited. Whereas this may be possible in some cases it is unusual; and it does not meet the case of isolated individual learners or learner categories or types ('target groups') who may be the unwitting subjects of research.

The resourcing and ethical issues raised above appear not to have been systematically and seriously addressed in recent years. Adult education research and researchers have continued to inhabit an unsatisfactory, shadowy area and to have a very ambiguous professional identity, stretched between social scientists on the one hand and community change agents on the other.

There is not a close correlation, but this ambiguity can be clearly related to the orientations and paradigms of research described above: political-sociological versus technical-apolitical.

There may also be a loose relationship with another common, not very helpful, dichotomy: quantitative versus qualitative. Quantitative methods, and researchers, tend to be seen as approximating academic social science. Qualitative research on the other hand is seen as 'softer' and less 'scientific', more focussed on the subject and less anchored in the academy.

This is a loose and misleading formulation: some qualitative research is valued within universities, and seen as valid empirical inquiry; but it tends still to be located at the weaker end of a status spectrum and has frequently to be justified and defended. Qualitative AE research relates to and commonly belongs with participatory action research. While these issues have become clearer in the past decade, no resolution of the tensions has been achieved, and the stereotypes remain strong.

## **5. Future Agenda - the Universities and AE Practice**

I have not listed the areas of adult education in which research has been achieved in the past decade. Instead I have suggested some of the forces influencing the nature of AE research and the research agenda; some of the dimensions of the problem of conducting and using AE research; and some of the criteria relevant to agenda-setting and monitoring performance, from the 1997 conference onwards.

It would be useful to establish simple typologies or matrices for identifying and monitoring which subject-areas of AE research are best served and which most neglected, as a basis for suggesting priorities.

Another way of describing the tension common to research in AE is in terms of a pull towards short-term problem-solving or towards long-term, more open-ended or 'blue skies' research. The strong practitioner tradition of much AE around the world, and its low and marginal status as a university subject, combine to pull most research effort towards the practical and applied. The interest of bodies like UNESCO in the impact of research on practice offers another example of the practitioner pull.

Many university-based adult educators may find themselves critical of the detached stance of universities, and their apparent remoteness from the pressing concerns of the societies which support them. On the other hand universities in many countries are under pressure to be more 'relevant' and useful, in their research, so the tension for AE research may be somewhat reduced in the future.

It would be useful to determine what balance of basic and applied AE research best suits the short- and long-term needs of modern complex societies in conditions of rapid and uncertain change.

Another aspect of the predicament of AE research, and a possible source of tension, is that it may be perceived as a sub-system of school educational research. The reaction away from this towards a distinctive (and sometime esoteric) andragogy can be artificially to separate kinds of research on education, learning and educational policy. This exacerbates the problem of comparative international research and partnership, since the concept of adult varies from society to society in important cultural as well as political and legal senses.

It would be useful to confront and resolve the relationship between adult and other educational research for the coming decade.

Most commissioned research, and much other research where there is competitive pressure to get quick results, is limited to short-term projects, of perhaps one or at most two years duration. There have been calls before for longer term projects. Yet it is rare for longitudinal AE research to be attempted over many years, for instance to trace cohorts of adults through their learning and recurrent education careers, or to map the long-term impact of an educational intervention on the fortunes of a target group or community.

It would be helpful to clarify in which areas longitudinal research is desirable, and to identify reliable means of funding such research over sustained periods of time.

We have noted that good adult education by its nature tends to be context-specific in order to motivate, and to relate to the needs of people in a particular time and place. This tends to militate against international comparative research, which requires comparison between very different settings and across often difficult cultural and communication barriers.

It would be useful to identify research questions which lend themselves to (preferably and necessarily quite long-term) cooperation and partnership between research groups in different countries (ideally North-South as well as South-South and North-North) so that the local particularities of AE can be understood in their different respective contexts.

It would be useful also to develop clear methodologies which would make truly comparative international research possible; and perhaps to arrange training workshops in comparative AE research methods.

While seeking to enhance the utilization of research in adult and adult basic education and its impact on practice, it is important to acknowledge the limits of what research can achieve - and indeed the limits to what adult education itself can achieve. Research is normally measured and judged through its output in the form of journal articles and monographs. We have to ask therefore by whom these writings are read and with what effect; and whether other forms of dissemination should not be promoted more vigorously. Publication, rather than community action or changes in the practices of adult educators, is the normal criterion for measuring research.

Even where there is a clear commitment to use research findings and improve practice, there are limits to what can be achieved. If the political will is lacking, or if the necessary resources are non-existent, good changes will not follow good research. If the AE practitioners are resistant to changes implied by research, because it threatens established interests or familiar preferred practices, change is unlikely to occur without very clear purposeful management which clearly goes beyond the scope of the research itself.

It would be useful to study further the dissemination and utilisation of research in adult education and to exchange examples of the successful implementation of research findings.

In particular it would be useful to identify and make known examples where university or institute-based researchers have created successful partnerships with field-based practitioners, leading to the direct, perhaps continuous testing and application of findings.

## Research Trends in Adult Education - A Communicative Proposal

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### 1. Uncommunicative interaction between adult education (AE) research, the framework of education, and social sciences research

A most transparent issue is the marginalized and 'uncommunicative' state of AE research. Marginalization is a characteristic commonly outlined in the adult education literature. Its uncommunicative state results from two attitudes:

1.1) Communities of researchers and professionals in the fields of education and social sciences ignore and even dismiss research on AE. Almost all salient authors, those whom adult educators quote, just do not know any journal, scholar or theory of AE.

1.2) Scholars of AE adopt the *'following model'*: findings on social sciences are applied to education some years later, and, some more years later, to AE. AE scholars tend to publish in specific journals only and almost never in the most prestigious journals of education or social sciences of their countries.

If the study of AE is not a part of the centre of social sciences and education study in general, if it is just one appendix, there will be no reason why communities of researchers and professionals of social sciences and general education should take it into account. Why should they care about theories, scholars or journals of AE, if they can find there only applications of theories which are already out of date? How can AE studies get space in general educational literature?

### 2. Additional barriers to the development of AE

This situation creates additional intellectual barriers to the development of AE:

2.1) AE is restricted to a marginalized position in power-knowledge relations.

In the present information society, knowledge has increasing power in all areas of social life. The exclusion of AE from prioritized knowledge further marginalizes AE in general. For instance, when governments or other important agencies want to commission an important study of education, they rely on specialist in other fields of education, excluding AE experience. This may even happen to such an extent that sometimes for such purposes they rely on professionals in education or social sciences in general, who ignore the AE field.

2.2) In the field of AE the findings of social sciences are often perceived only many years in delay.

Frequently, by the time the findings of general sciences arrive to education, the situation that generated them has disappeared. It is even worse in AE, not only because the delay is longer, but also because it is a quicker changing field than the school system.

2.3) AE is considered as a humanitarian activity but not intellectually or scientifically grounded.

In the present world that kind of consideration has important negative consequences in terms of allocation of resources.

2.4) Findings developed in other fields of education are applied mechanically to AE.

When researchers of social sciences and education study AE they do not care about the studies of AE and mechanically apply the findings of other fields like children's education.

2.5) Dismissing creativity of practitioners and participants.

Scholars are more focused in applying a secondary version of general study than to contribute to the general development of knowledge from our field of AE, and acting as promoters of communication between those developments and the creative activities of many practitioners and participants.

### 3. Communicative perspective versus andragogic ghetto

This marginalisation stems mainly from the power structures that characterise the social construction of scientific knowledge. Because AE is a less powerful activity for less powerful participants, it is assumed that its practice and theory have less quality than other fields - one more of the structural exclusions that shape inequalities caused by power.

However, old systemic and structuralist theories are outdated, although the post structuralist derivation of structuralism is being developed. Structures and systems are just one side of the present dual conceptions of society. The other side are human agency and lifeworld. Systemic definitions of AE (like a system or a subsystem) should be overcome. In other words, besides structures, also, **people act**. Adult educators are people and we can act in a different orientation of structures.

For some decades, many adult educators reacted by trying to reinforce AE study in an isolated position under the umbrella of a separated science, andragogy. This had positive effects for the development of the field and its institutionalization in sites like universities. But now the maintenance of that orientation is negative. Knowledge created by isolated andragogy is not significant for other fields; current developments of AE require other insights from other fields of study.

Such an attitude strengthens marginality and closes the borders of a ghetto. Because we do not get the recognition of the general community or researchers and the wider society, AE as a field of study is threatened. This crisis can be faced with a simultaneous double action: on the one hand, bolstering specificity of our field of study; and on the other opening it, crossing its borders.

It is time to cease the defensive of marginalisation. The idea of developing a new science, the science of AE, is the iceberg top of a tendency to consolidate the field of AE as a ghetto: isolating ourselves in our own meetings, journals, theories and communities and renouncing the transformation of AE as a key issue in the wider society including researchers, specialists, professionals, politicians, and participants in many fields.

If the study of AE is not at the center of social sciences and educational study in general, if it is just one appendix, general communities of researchers and professionals will not take account of it. Why should they care about theories, scholars or journals of AE, if they can find there only applications of what they did some years before? How can such AE studies get space even in educational general literature?

A communicative proposal consists in opening doors to the wider society. It is needed to abandon the security of the refuge of the ghetto and collaborate and contrast with other communities. AE is a central part, not an appendix of the general field of education and social sciences.

What can we take from the others, and what can we contribute to others? For instance, we can make wonderful contributions to the development of a communicative approach to education and learning. General social sciences research has been moving to that perspective for some years; soon the educational field will do similarly.

AE has always been more oriented to dialogue and communication than other educational and social fields. This inclination has come from a variety of related factors: adulthood of participants, flexibility of institutions, and dialogic theories. A lot of creative elements of the theories and practices of AE are available to develop this perspective. It is not necessary and it is not helpful to wait until some years after its development in the general field of education.

### 4. Participatory versus exclusionist research

A communicative perspective overcomes both the traditional modernist subject-object division and the postmodernist dissolution of the subject. It is based on inter-subjective communication among all implicated in the action. Dichotomy between general exclusionist research and local participatory research is overthrown.

AE is a field where this tendency is more possible than in other educational fields. Although practitioners and participants lack powerful organizations, they are usually more active and creative, and



closer to intellectual debates and critical theories. Our activities are not so systemically colonised as are many in the school system.

Research on AE has to include different processes, modalities and methodologies of research along with diverse levels of participation of the plurality of subjects. The relation between all those researches should be communicative and not hierarchical. Quantitative methodologies and large scale empirical studies are neither more nor less scientific than qualitative or community-based participatory research. Yet many researchers of the former mode ignore the most important theories of adult learning.

Egalitarian principles of AE imply for our research contributing to the fight against exclusions like sexism, racism and 'ageism'. But research itself should contest exclusion of any kind of style or study. The ideal situation to look for is the combination between methodologies, orientations and researchers in a communicative process where all collaborate respects, to the development of AE.

### **5. Communicative versus comparative research**

Comparative research predates the development of communicative approaches to knowledge and education. Currently, it is being challenged by present world social movements, and social sciences research. Nevertheless, common understanding of comparative research is linked to the creation of common standards that allow us to compare the AE situation in different spaces.

The promotion of internationalism in the shape of comparative research is fatally tied to an old and ethnocentric idea. Outdated multicultural, intercultural and pluricultural maturations make it impossible to follow that path in the future. For instance, we should contest internationally the ethnocentrist attempt to create a model of research in the most powerful countries and extend it to the rest of the world, with adaptations from place to place.

It would be clearer and more advanced to say that UNESCO is going to promote communicative research, and that one of the elements could be comparative research. The aim is to communicate about our diverse methodologies, approaches, orientations and contexts. That is both the starting and the end point of international collaborative research.

As a result of such communication, one agreement could be to develop common standards for making comparison about some concrete aspect. Hierarchical attitudes in the relation between countries, categories of researchers, methodologies or prioritised needs have no place in such a process.

### **6. Communication versus the dichotomy between homogeneity and diversity**

International cooperation is not a search for homogeneity associated to some proposals for comparative studies. Likewise, it does not consist in old disputes about the superiority of quantitative or qualitative methodologies, specialised or participatory research, and so on.

Those tendencies to homogenization make no sense in the present information society. We need all types of research, and the colonization of weaker approaches by the strongest would be impoverishing. If international co-operation strengthened that process it would contribute to the closed circle of cultural inequality: to give more to those having more. This would be hidden by the transfer of some material resources from more to less powerful countries, as the price of renouncing their own development: this is the path of both old and new colonialism.

At the other extreme, a communicative approach overthrows the relativist idea of diversity, the assumption being that what any country, team and researcher is doing should not be criticised from another space. Communication is not just to inform and go back as we are before the dialogue, but to enrich each other with our respective experiences. We can take methodologies and findings from others and even abandon some of our mistakes.

Ethnocentrism and relativism are two major threats to the AE principles and communicative international cooperation. Ethnocentrism tries to impose enlightenment through a homogeneous concept of culture as if it were universal. The answer to ethnocentrism is: we are different. Relativism tries to deconstruct any idea of collaboration under a concept of difference that hides inequalities as if it was

impossible to make any universal agreement like the idea of equal human rights for everybody of all genders, ethnicities and ages. The answer to relativism is: we are equals.

The communicative approach overcomes both ethnocentrism and relativism with the statement that we are both equal and different, not homogeneous and unequal.

## **Research Trends In Adult Education - Regional African Study**

Report of the African Regional Workshop on Adult Education Research Trends, 01 - 03 December 1993

**Department of Adult Education**  
University of Ibadan  
Nigeria

### **Adult Education Research Trends in Africa**

#### **1. Introduction to the Study (Commission, Process and Methodology)**

The Department of Adult Education, University of Ibadan has been invited by the UNESCO Institute for Education to participate in a world trend analysis on educational research in adult education. Five regional operations are expected to take place in developing countries (Africa, Arab States, Asia, Europe and Latin America). The objective of this exercise is to strengthen the impact of educational research on the development of adult education, and to assess the present and possible contribution of universities and other research centers to such development. The project thus wears a comparative look; and the exercise will lead to one region learning from another, and thereby promoting the cause of adult education, non-formal education and development.

The project is international in scope and thereby calls for partnership among prominent international agencies, associations and organizations involved in running, studying, teaching and researching into adult and non-formal education programmes. Those involved in the partnership include the UNESCO Headquarters, through its Higher Education and Research Division and the UNESCO Institute for Education, the European Association of Adult Education Research (ESREA), the Dutch research and cooperation center (CESO), the Adult Education Department of the University of Ibadan, Nigeria, the Indian National Institute of Adult Education, the REDALF network of OREALC with the Brazilian National Institute of Educational Research, the Canadian ICEA (in collaboration with other Canadian associations) and the Canadian Commission for UNESCO.

The Department of Adult Education, University of Ibadan is to involve scholars in African countries in this comparative study. To this end, the Department held a planning meeting on the project, and decided on a number of strategies (processes and methods). The first strategy is to examine how adult and non-formal education are conceptualized across cultures on the continent of Africa, especially among English-speaking, French-speaking, Portuguese-speaking and Arabic-speaking countries.

The second strategy is to classify and delineate the scope of adult education and non-formal education by purpose and function.

The third strategy is to involve key public and private agencies and research centers engaged in adult and non-formal education practices and studies in different African regions.

The fourth strategy is to identify and contact professional colleagues in North, South, East and West Africa who are genuinely interested in the project and can participate meaningfully in supplying information on their regions and their countries.

The fifth strategy is to evolve a division of labor approach to the handling of the project. The suggestion for Ibadan is to get the department staff into group formation. Each group can be charged with studying one area (e.g. adult literacy, extra-mural studies, correspondence education, remedial education) of adult and non-formal education.

The sixth strategy is to arrange a regional workshop on regional trends, using data gathered through Ibadan, and submissions made by professional colleagues, representing different parts of Africa.

On the basis of the above strategies, the Department decided for a regional seminar on December 1-3, 1993. Letters of invitation spelling out the objectives of the exercise were forwarded to colleagues in Africa. The composition of those invited reflected the geographical and linguistic spread in Africa. The presentations at the workshop included an introductory account on the project, the state of the art in adult

education research in some Africa regions (e.g. West, South and East Africa). Specific assignments to be carried out in getting the assignment completed thoroughly were suggested by a sub-committee. The Department was requested to coordinate expected response and put them into proper perspective for the realization of the objectives of the project. The main objectives of the Seminar were to:

- (1) provide room for the exchange of ideas among adult education researchers in Africa;
- (2) Identify the foci of adult educational research in Africa;
- (3) determine the trends of adult education research, including neglected themes;
- (4) prepare a report on adult education research trends, based on presentations made and reports received;
- (5) present a statement on adult education research in Africa.

Specifically, colleagues were expected to examine unpublished adult education projects/dissertations/theses, works in print on adult education, works completed and accepted for publication, those not yet accepted for publication, and research in progress on adult education. Both quantitative and qualitative aspects of adult education research and evaluation were therefore to be considered and given prominence.

The Head of the Department was mandated to contact those who were invited but could not attend the workshop. He was mandated to encourage them to submit their reports to him before the end of January, 1994. In this regard, the submissions by Barbacar Diop from Senegal, Dele Braimoh from Lesotho, and Yosiah Bwatwa from Tanzania contributed to the accomplishment of the project.

#### **Criteria for selection of participants.**

Participants for the workshop were selected on the basis of their involvement in adult education research and practice over many years. The Introductory paper by Omolewa, whose pages 13 - 16 show a list of 31 resource persons in adult education (see Appendix 1), reflects a geographical spread with representations from West Africa (Sierra Leone, Ghana, Nigeria, Senegal and Cote d'Ivoire); East Africa, represented by Yosia M. Bwatwa, of the University of Dares-Salaam; Anthony Okech of the Makerere University and Prof. David Kirui of Nairobi, Kenya. Southern African region had Len Le Roux of Namibia, Dr. Peter Higgs of Malawi, Lois Sebatane of Lesotho, Meshaki Matshazi of Zimbabwe, Rejoice Tsabedze of Swaziland, Frank Youngman of Botswana, Dr. Francis Pretorius of Pretoria, South Africa. Also, Drs. O.A. Adeola and Dele Braimoh of Botswana and Lesotho respectively (currently on leave from the University of Ibadan) were included.

The areas of specialization and methods of research methodologies of the various resource persons vary extensively, in line with the needed mix required of a research of this nature.

## **2. Context of the Study (Background on Africa, Nature of Adult Education Objectives, Significance and Limitations)**

No uniform and well-defined systems of non-formal education obtain in any one African country, primarily due to the diverse sources from which programmes and activities originate. Further, unlike the formal system of education where one single ministry is invariably in charge of all its segments (i.e. primary, secondary, technical and higher education), non-formal education programmes have in the past appeared and presently appear spontaneously, often without prior long-term planning, from different ministries, departments, and non-governmental organizations in order to meet emergency situations. For this reason, the process of developing regulated and coordinated systems of non-formal education has been made difficult, notwithstanding the efforts which governments have been making towards that end.

African governments have set up various bodies with responsibilities for advising them on the development of adult education; on the establishment of appropriate institutions and training programmes; and to coordinate courses in curriculum development, methodology and pedagogy to personnel of ministries, industrial and commercial concerns and voluntary organizations for the development of their programmes in continuing education.

At the same time, through their extra-mural divisions, these institutions provide leadership in initiating and providing a wide range of non-formal education courses for those who want it, either direct

through their own extra-mural sections or through voluntary national associations, such as the people's Educational Association of Ghana and Sierra Leone and the national adult education associations in a number of countries. Further, they are continually requested by other organizations to design and conduct short-term training courses, seminars and conferences in specific aspects and areas of rural and urban development, in which specific aspects of adult education form essential components.

But by far the greatest service these colleges/departments/institutes/centers render to adult education programmes has been, and continues to be, the preparation and training of students for academic and professional qualification, starting from the certificate to the postgraduate levels, in order to provide the expertise for the development and direction of the variety of programmes in adult education in their countries. Together with other university institutions and departments, as in the countries distance education programmes, the correspondence departments and similar institutions within universities, they have provided opportunities, for those adults who wish to learn while they work, to attain academic and professional qualifications normally available only to residential students of universities.

### 3. Research Trends

Following the brain storming that was held between December 1st and 3rd, 1993, as well as written presentations made, the following observations were made:

Much of the research that has been conducted on African adult education has tended to probe whether:

- a) The nature of available research is relevant to the environmental needs of Africans;
- b) The linking of research in adult education with the social, political and economic sub-system can lead to the national and international growth and development of the region;
- c) The forms of adult education research done so far have not been more of a disaster than of blessing to the overall development of those who ought to benefit from the findings; and
- d) There are other areas that are of more relevance to the socio-economic and political development of the region that have not yet been fully researched into.

These pre-occupations seem to have influenced the research activities that have been initiated thus far.

#### Current Research Trends:

- (1) Literacy
- (2) Distance Education/Correspondence Education
- (3) Continuing Education
- (4) Non-Formal Education
- (5) Philosophical approach - a focus on Freirean conscientization
- (6) Women education including family life, family planning
- (7) Psychology of adult learning
- (8) Prison education
- (9) Nomadic education
- (10) Extension education
- (11) Community education and development
- (12) Participatory research
- (13) Labor and industrial education
- (14) Historical research
- (15) Biographical and bibliographical works
- (16) Studies on non-governmental organizations
- (17) Comparative adult education studies
- (18) Mass media in adult education
- (19) Gerontology and adult education
- (20) Apprenticeship education
- (21) Post-Literacy and other equivalency programmes - Little work

- (22) Environmental management and adult education - An area most unexplored.

#### **4. Future Thrusts**

The national education objectives as enunciated in the educational policies of most African countries are geared to the achievement of the integration of socioeconomic and political development policies in such a way that there can be balanced and more rapid development. Adult education research aims at sharpening this focus, and broadening it would be helpful in suggesting ways to remove obstacles hindering the process of integration.

Again, this would be based on the mission and goals of adult education in relation to the problems and current needs of African people.

Specifically, research would be needed on:

- (1) The urgent environmental needs of the people in relation to the culture, religion, social development and the economy of the sub-region;
- (2) Woman in development, especially relating to their role in the underdevelopment of Africa, and the possibility of their positive contributions to the growth and development of their communities; strategies for maximizing educational opportunities for women and girls; premature marriages, pre-mature child-bearing; child labor; adequacy of curricula for programmes of teaching and learning; teaching and learning strategies and materials.
- (3) Literacy, especially with regards to establishing, in quantitative terms, how literacy leads to development, or the correlation between literacy and development; the true picture of the literacy/illiteracy situation in Africa.
- (4) Distance education - seeking to establish a widely acceptable definition of the concept, and how it can serve as a true substitute for the formal system of educating; how it can contribute to overall development. The focus can be on such concepts as desertification, nomadic populations or migrant fishing families.
- (5) Under-researched areas in the psychology, history, philosophy and sociology of adult education.
- (6) Adult guidance and counselling;
- (7) The use of drama in popularizing adult education and in enriching its practice;
- (8) Contemporary issues like confidence building, retirement education, population education etc.

#### **5. Recommendations**

Following the exchanges and the Regional workshop, a number of issues now cry out for attention:

It has been noted that resources (personnel, money and materials) for prosecuting adult education research in Africa are grossly inadequate. There is therefore the urgent need to mobilize resources that will be adequate to foster research activities in the field of African adult education.

There is the need to strengthen the various networks in Adult Education Research in Africa. To this end, we recommend that contact be made with the existing networks in the region, such as the Association of African Universities in Ghana, the UNESCO Regional Office in Dakar, and the African Association for Literacy and Adult Education in Kenya, which already has an university network.

As a viably strategy, we propose the immediate inauguration of a purely research outfit, namely, African Adult Education Research Association (AAERA) to undertake the tasks of:

- sharing information;
- exchanging advice among consultants;
- collaboration in staff training;
- accepting each others' students;
- acquiring and/or exchanging external materials,
- collaborating on adaptation of materials;
- establishing credit transfer arrangements; and
- creating a common open learning system.

It was agreed upon with the Department of Adult Education, University of Ibadan, should serve as the operative machinery for the Association's take-off.

Similarity, we should urgently undertake the publication of the Journal of Adult Education Research in Africa (JAERA); and an Adult Education Index, to consist of all available publications within Africa, and on Africa from the outside world. In addition, we should produce an Annotated African Regional Directory of Adult Education Dissertations and Theses. The aim is to generate information as demonstrated in Figures 1 and 2 and Table 1.

It is also hoped that an African Adult Education Research Inventory is published, to list distinguished adult educators by institution, inventory, research interest, and country.

These activities would have to be accompanied by the identification of a viable source of funding needed for support and performance.

## **6. Acknowledgements**

We wish to thank the following Institutions:

The UNESCO Institute of Education (UIE), Hamburg, for initiating the idea of this project; and for using it to promote capacity building of researchers in Africa.

The Authorities of the University of Ibadan, for their immeasurable support and understanding.

All the Institutions that showed interest in, or actually participated in the workshop.

The DVV, for their timely and useful input.

The Federal Ministry of Education, especially the National Commission for UNESCO, for their kind assistance.

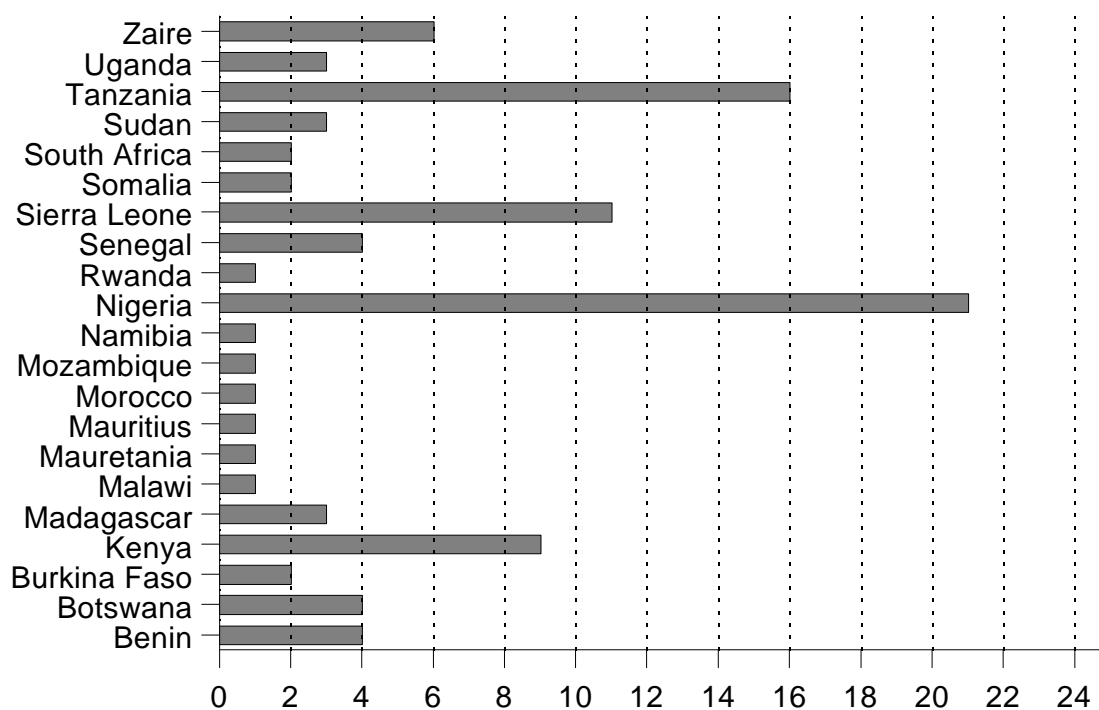
Professor C.N. Anyanwu

Head

Department of Adult Education

University of Ibadan

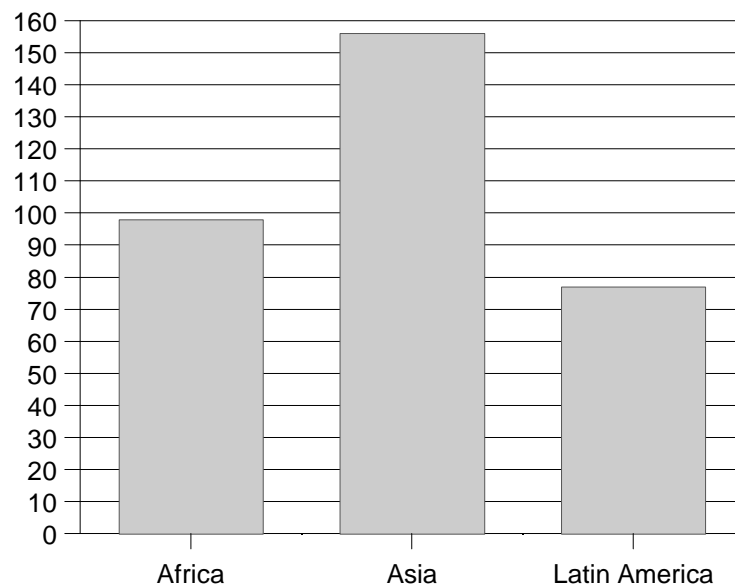
**Figure 1:** Country Index of Contributions on Africa published in *Adult Education and Development*, 1973-1993



**Source:** Correspondence from H. Hinzen, Editor, *Adult Education and Development*, October 15, 1993



**Figure 2:** A comparative Index of contributions published in *Adult Education and Development* in developing countries of the world, 1973-1993



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**Source:** Correspondence from H. Hinzen, Editor, *Adult Education and Development*, October 15, 1993

**Table 1**Frequency of Articles on subject Basis in *West African Journal of Education*, 1957 - 1976

Subject	No. of Articles	Percentage
Adult Education	82	10.7
Teacher Education	309	40.3
Educational Management	217	28.3
Physical and Health Education	30	3.9
Special Education	21	2.7
Guidance & Counselling	93	12.14
Library Studies	15	1.96

**Source:**

Computer from W.O. Oyelese, "West African Journal of Education:

Index to volume 1-20, 1957-1976" by Michael Omolewa (1985)

"The First Twenty-Five Years of the *West African Journal of Education*, 1957-82" in *Pedagogical Histories: International Journal of the History of Education*, Vol 25 no 1.**Table 2:**Frequency of Articles on Nigeria, Ghana, Sierra Leone and the Gambia in the *West African Journal of Education*, 1957-1976.

Country	No. of Articles	Percentage
Nigeria	268	89.9
Ghana	19	6.4
Sierra Leone	10	3.4
The Gambia	1	0.3

**Source:** As in Table 1.**Some Details on the Workshop**

As earlier mentioned, Prof. Omolewa's "Introduction to the Study" opened the way for other discussions at the Workshop. Also, his background paper "Adult Education Research: World Trend Analysis (Africa)" helped in identify the focus of discussion to follow. This was after the general opening ceremony at which the Vice Chancellor's Welcome address was read, and the Dean has opened the Seminar.

The First Technical Session thus provided an overview of the study.

Then, there were presentations on Nigeria from Prof. A.B. Oduaran, Dr. S.A. Indabawa, Prof. Okeem, Prof. Lekan Oyediji and Dr. Gbolagade Adekanmbi (who presented his and Dr. Osuji's paper). Discussions were then held on these presentations. Reports of these discussions are already part of the Workshop report prepared.

During the Technical Session 2, Mr. Richard A. Banibensu, presented reports from the University of Ghana. After this, Correspondence reports from Southern and East Africa were examined.

The third Technical Session (Day 2) provided opportunities for a discussion of the presentations, and there it was decided, after an exhaustive discussion of the issue, to also incorporate other reports being expected from Babacor Diop, and Ustasi and Adeola, from the French speaking Africa and Botswana respectively.

Technical Session No. 4, also on the second day, provided opportunity for a reflection on current issues and perspectives in the field. Prof. Anyanwu was chairman of this Session. Technical Session No. 5 was the presentation of the summary of findings.

Participants left on the third day.

### List of Participants

1. **Clement Nnerem Anyanwu**  
Professor of Community Education, and Head, Department of Adult Education, University of Ibadan.  
Prof. Anyanwu has published extensively in the field of adult and community education, community development, adult basic education and workers' education. He has also written on the history of adult education.  
During the Regional Workshop, Prof. Anyanwu read the opening address and was Chairman of the Session on "Current issues and perspectives" during the Technical Session 4 of the Programme.
2. **Michael Abiola Omolewa**  
Professor of Adult Education, former Head of Department of Adult Education, and former Dean of the Faculty of Education, University of Ibadan. He has published extensively on the history of adult education, adult education and community development, distance education, labor education, and continuing education. He headed the Department when it won the prestigious 1989 UNESCO IRA Award for Literacy. He later led another research team to win the Inaugural honorary mention in the UNESCO's Institute for Education in Hamburg Literacy Research competition organized for UNESCO in 1992. Prof. Omolewa's introduction to the study and another draft working paper titled "Adult Education Research: World Trend Analysis (AFRICA) provided rich background material for all the participants at the Workshop.
3. **J. T. Okedara**  
Professor of Adult Education, former Head to Department of Adult Education and former Dean of the Faculty of Education, University of Ibadan.  
Professor J. T. Okedara has published extensively in the field of adult education, including its economics, literacy, comparative studies in the field and organization and administration of adult education. In October 1991, in conjunction with Prof. Lalage Bown and Prof. Emeritus Alexander Charters, he organized the World Conference on Comparative Adult Education at the University of Ibadan.  
He contributes extensively during the Workshop, bringing his wealth of experience to bear on its final outcome. He was also the Chairman of the Second Technical Session.
4. **Lekan Oyedeji**  
Professor of Adult Education, University of Lagos, and Head and Consultant, Federal Government of Nigeria/European Economic Commission, Middle Belt Project at 3, Plantation, Road, Ilorin, Nigeria.  
Professor Oyedeji's areas on interest in adult education include gerontology and psychology of adult education.  
During the workshop, he presented a paper titled "Trends in Adult Education Research: The University of Lagos Contribution".
5. **T. O. Fasokun**  
Professor of Adult Education, Obafemi Awolowo University, Ile-Ife, Nigeria.  
Professor Fasokun has published extensively in the area of adult and continuing education. During the workshop, he contributed immensely to give the proceedings its needed focus.

6.     **E. O. Okeem**  
 Professor and head of Adult Education, University of Nigeria, Nsukka.  
 Professor Okeem has widely published in the field of adult education, especially in political and civic adult education.  
 During the regional workshop, he discussed a sub-theme titled "Research Themes in Contemporary Nigeria".
7.     **Akpovire Oduaran**  
 Professor of Adult Education, University of Benin, Benin, Nigeria.  
 Professor Oduaran has written papers, articles and edited works on distance education, community education and development, literacy, adult and workers education. His interest now is in prison and women education.  
 During the workshop, he presented a paper on "Research Trends in Adult Education at the University of Benin".
8.     **R. Banibenau**  
 Research Specialist, Institute of Adult Education University of Ghana, Legon.  
 Mr. Banibenau represented Ghana during the workshop and presented a paper titled "Research Trends in Adult Education at the university of Ghana, Legon".
9.     **Dr. E. E. Osuji**  
 Senior Lecturer in Adult Education, Department of Adult Education, University of Ibadan. His field of specialization is Community Development. He co-presented a paper titled "Research Trends in Adult Education at the University of Ibadan".
10.    **Dr. M. A. I. Omels**  
 Senior Lecturer in the Department of Adult Education, University of Ibadan. His field of specialization is industrial education. He contributed to discussions during the workshop.
11.    **Dr. M. O. Akintayo**  
 Dr. Akintayo is a lecturer in the Department of Adult Education, University of Ibadan. His research interest include adult and industrial education. He contributed to discussions during the development. He has published extensively in these areas.  
 During the workshop, he presented reports from East and Central Africa.
12.    **Dr. (Mrs) D. A. Egunyomi**  
 Dr. D. A. Egunyomi is a lecturer in the Department of Adult Education, University of Ibadan. Her area of specialization is Continuing Education. She has coordinated the academic programmes of the Center for External Studies, University of Ibadan for many years. She participated actively during the workshop.
13.    **Dr. Gbolagada Adekanmbi**  
 is a lecturer in the Department of Adult Education, University of Ibadan. His area of interest in Distance Education and Industrial Education. He co-presented a paper during the workshop titled "Research Trends in Adult Education at the University of Ibadan". He also presented some reports on adult education research in the Southern African region. He has written many articles and edited books an adult and distance education.
14.    **Dr. R. A. Aderinoye,**  
 is a lecturer in the Department of Adult Education. His areas of interest include adult and distance education. During the workshop, he contributed to the discussions. He has published papers in the areas of interest.
15.    **Dr. Bimpe Daniel-Okiei,**  
 is a lecturer in the Department of Adult Education at the university of Ibadan, Nigeria. Her area of interest is Social Work and Community Development. She contributed to discussions during the workshop.
16.    **Dr. I. A. Akinola,**

is a lecturer in the Department of Adult Education. His areas of interest include Industrial Social Work, Industrial Relations, and Psychology of Adult Education. During the workshop he contributed to the discussions.

17. **Dr. Sabo Amin Indabawa,**  
is a lecturer and former acting Head of Department, lectures at the Bayero University, Kano. He has published extensively in adult literacy and education. His areas of interest are adult literacy, Women studies in adult education and community development. He presented a paper during the workshop titled: "Research Trends in Adult Education in Northern Nigeria".
18. **Mrs. B. M. Ajayi,**  
is a Project Officer with the Community Development/Literacy and Health Project of the University of Ibadan. She was former Director in the Federal Minister of Education. She brought her wealth of experience on the project to discussions at the workshop.
19. **Prof. A.B.O.O. Oyediran,** Vice Chancellor of the University of Ibadan. His welcome address was read at the Opening Ceremony of the workshop.
20. **Prof. J. O. Akinboye,** Dean, Faculty of Education, University of Ibadan, read his opening address at the workshop.

**Among the Contributions sent were:**

21. **Boubacar Diop** - Research Trends in Adult Education in French-speaking Africa titled:  
(1) La Recherche En Matiere D'Education Des Adultes  
(2) Project de Colloque sur L'Education des Adultes dans les Universities Africaines.
22. **Utsatsi, K.S. and Adeola, O.A.** Research Trends in Botswana.

**Members also examined:**

23. **Frank Youngman's** "Priorities for Adult Education Research in Botswana"  
Boleswa Educational Research Journal, Vol 4, 1986.

## Annex I

### Adult Education Research: World Trend Analysis (Africa)

**Michael Omolewa**  
University of Ibadan  
Nigeria

The Department of Adult Education of our University of Ibadan has been requested by UIE to prepare the position paper for Africa. The decision to entrust this important task to the University of Ibadan must have been informed by the long tradition of that institution in adult education research and its award of the UNESCO International Reading Association Literacy Prize, in 1989 succeeding Argentina (1988), Spain (1987), Colombo (1986), Morocco (1985), Mexico (1984), Kenya (1983), Indonesia (1982), India (1981), Ethiopia (1980) and Papua New Guinea (1979), and becoming the first university to be so honored.<sup>1</sup> The University of Ibadan leadership under Professor A.B.O.O. Oyediran has also been consistent in providing the Department an atmosphere conducive to innovation and academic excellence.

We must also note that a research team drawn from the Department and consisting of Omolewa, Adeola, Adekanmbi, Avoseh and Brainmoh, won the Inaugural Honourable Mention of the Literacy Research Award administered by the UIE in 1982. Finally, Nigeria's first Ph. D. award in adult education was given to a thesis written by Sydney Osuji and supervised by Akinpelu and Omolewa in 1981.

The current research project should involve respected adult education researchers in other parts of Nigeria. I have already proposed that our Ibadan team be joined by accomplished adult education scholars versed in the art of producing research syntheses and reports outside our pioneer institution. Among these are A.B. Oduaran, Ag. Head of the Department of Adult Education and Extra-Mural Studies at the University of Benin and Tom Fasokun, Professor of Adult Education at the Obafemi Awolowo University at Ile-Ife. We shall need to bring in leading researchers from our sister Universities at Kano, Lagos, Nsukka, Calabar, Port Harcourt, Jos, Zaria, Makurdi, and the Institute of Adult Education at Bauchi, where considerable work is being done. I believe firmly that this output must stimulate cooperation and not competition among the Nigerian scholars.<sup>2</sup>

I also believe that the intention of UIE is to involve a team of researchers from other African countries. I know that a study team on the Chronicles of Adult Education supported by the Commonwealth Association for the Education and Training of the Adult was once assembled by James Draper of Canada from proven researchers including Yosia M. Bwatwa of Tanzania, Miranda Greenstreet of Ghana, Peter Higgs of Malawi, David Kirui of Kenya, Meshak J. Matshazi of Zimbabwe, Elizabeth Mumba of Zambia, Anthony Okech of Uganda, Michael Omolewa of Nigeria, Len Le Roux of Namibia, Lois Sebataane of Lesotho, Rejoice Tsabedze of Lesotho, Edward Turay of Sierra Leone and Frank Youngman of Botswana.

I have already seen the draft of much of the submissions of these scholars and I will recommend that they be all involved. In addition we shall need to bring academics and policy makers from other non-

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<sup>1</sup> G. Siegman, ed., World of Winners: A Current and Historical Perspective on Awards and Their Winners 2nd edition, London and Detroit, Gale Research Inc. 1992, p. 866. See also J.A. Akinpelu and M.A. Omolewa, eds., 40 years of Adult Education at Ibadan, Ibadan, University of Ibadan, Dept. of Adult Education, 1989.

<sup>2</sup> One of the following-up projects to this work should be the production of the Adult Education Research Inventory in Africa in which all the distinguished adult educators will be listed by institution, research interest, and country.

English speaking countries, for example, Babacar Diop of Senegal, Carlos Fumo of Mozambique, and Genuez Vigner of Cote d'Ivoire.

Most of the studies of Africa in recent times have excluded South Africa. Perhaps this was understandable in a period when apartheid was unchecked in that country. Recent developments will seem to encourage a reintegration of South Africa and already, there are some excellent studies conducted in the country, among which are d. Thaw's 1988 M.A. Thesis of the University of London entitled "Non-formal education for structural change: theoretical considerations for the South African context", and C.S. Ellis' Promotion of Literacy in South Africa: Numbers and distribution of literate Black adults, published in 1982 by the Human Sciences Research Council in Pretoria. We may wish to bring in Dr. Francois Pretorius of the University of South Africa to coordinate the efforts at preparing a country profile. D. Wes, author of "Language and education policies as indices of apartheid in South Africa" (1983) can also be involved.

We shall certainly need a forum to meet. To bring even a few people to Ibadan may prove financially difficult at this period in the history of our university system in Nigeria.

However the UNESCO Regional Office for Africa (BREDa) may prove sympathetic and donate to the project a few tickets. We should also explore the possibility of assistance from our Nigeria Educational Research and Development Council (NERDC), the body that had sponsored the nation's inaugural educational research conference in May 1985.<sup>3</sup> I am not sure whether the National Commissions of UNESCO can provide any aid at this late hour, but it is worth asking the respective Secretaries-General many of whom are always eager to aid innovative programmes. I expect that our National Commission for Mass Literacy, Adult and Non-Formal Education, led by our imaginative and constantly supportive Hajia Amina Ahmed will be contacted for help. In any case, we should not let this opportunity of establishing an Adult Education Research Network elude us this year.

Each selected researcher should ensure that other colleagues are contacted and that the output of country analysis has not been a monopoly of an individual. We shall expect contributors to use the familiar research strategies of interviews, field work and observation, literature survey etc. to assist in producing a thorough analysis, which should be original and reliable.

To assist researchers in identifying the objective of the survey, the material from the U.I.E is being enclosed for careful study. It is perhaps needless to state the expectation that this study must be rigorous, accurate, detailed, and critical. Happily, being on the ground in the various countries and having access to articles, books, theses produced locally by staff and student, each contributor should be able to identify the subject preferences of the researchers, and carefully analyses the materials. Patterns that emerge must be explained, again carefully.

We are likely to have difficulties in deciding what constitutes the board spectrum of adult education. To many, the emphasis has been on literacy. Yet we know that on Zambia W.H.M.L. Hoppers has produced his Ph.D. thesis in 1984 on the title "From school to work; a study of youth, non-formal training and employment in Lusaka", D.A. King has written a thesis in 1980 on an aspect of community development titled "Community education in Sierra-Leone's perspectives from Bunumbu" E.B. Okunrotifa's article in the Scottish Journal of Physical Education (Vol 15 No. 2, Summer 1987 at pp 45 - 48) was on an aspect of adult physical education, titled "Towards a more active life style: adult's reaction". C.C. Agoulu has considered another aspect of adult learning in his "Education of Library users in Nigerian Universities" in the "Education of Library users in Nigerian Universities" in Education Libraries Bulletin vol 25 part 3, Autumn 1982, pp. 20 - 29. But even while we bring in literacy, continuing education, distance education, remedial education etc. we shall still need to examine researchers' concepts of these terms and see whether we are singing a similar song.

As a preliminary guide, I shall advise that we look at Frank Youngman's Adult Education in Botswana, 1960-1980: an annotated bibliography, Gaborone, University of Botswana, 1981. Edward

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<sup>3</sup>

The primer mover of the Conference, Professor S.O. Awokoya, is sadly dead, but her aides, Professor Ayo Bambose and Mrs. Yetunde Holloway are still around and influential in Nigeria.

Turay's Adult Education in Sierra Leone C. 1890-1939 will also give some insight into the complexity of our term, adult education.

We will expect contributors to identify the major research thrusts in each selected country against the background of the various national education policies. We should be able to know the extent to which research has led to the development of educational policies. Or, to what extent has research been a response to (or product of) policies? To what extent has research in adult education focussed on the traditional disciplines of history, psychology, economics, philosophy, sociology? What proportions are being already done in these areas and why? What in-roads have been made on specific adult education fields such as literacy, distance education, community education, remedial education, liberal education, adult learning techniques and processes, international adult education, evaluation, ageing ?<sup>4</sup> Have these findings been used in adult education practice?

It should be useful to compare research findings in the various countries as we set out to sharpen our concepts and meanings of the various terms. We should also now begin to know why research is undertaken, where and why.<sup>5</sup> Our report should be able to identify the types of research being conducted by African scholars in African institutions, the research being carried out in overseas universities by African researchers, and the adult education research being undertaken by non-African scholars overseas. Dissertation abstracts available in most African and overseas universities should assist in identifying the studies. A careful search in the journals should also prove helpful. Again some attention should be focussed on the volume, relevance, appropriateness and variety of work that is being done outside the region. The Commonwealth Secretariat has already noted in its reports from 1986 that foreign exchange problems have led to a reduction in the number of African students abroad. We must however recognize the point that postgraduate students have remained fairly numerous.

For example, Nigeria has 156 students in Canada in the 1979/80 sessions, and 185 in the 1982/83, 174 in the 1983/84 sessions, and 146 in the 1984/85 session. Can we identify the research that is being done by those specializing in adult education? Would it be possible to compare the preoccupations of research students, overseas with those in the local institutions? J.J. Lauer, American and Canadian doctoral dissertations and master' Thesis on Africa, 1974-1987, Atlanta, African Studies Association, 1989, H. Price, C. Hewson and D. Blake, Theses on Africa 1976-1988, accepted by the universities in the United Kingdom and Ireland, Sevenoaks, 1993 can assist retrieve materials.

Another aspect of your analysis should be the issue of the research climate. I have already noted elsewhere that active adult education research began in Nigeria with the introduction of the country's first degree programme at the University of Ibadan in 1971.<sup>6</sup>

It will also be necessary to attempt a chronology of research output, say in ten-year phases, and explain the factors that have aided these research efforts. Let us also seize the opportunity of our write-up to consider, very briefly, the major-constraints confronting us in the region as researchers. We may identify the issue of access and facilities. How many of us, for example have access to the modern facilities to computer literature check, the sophisticated Public Libertas Terminal? Do we continue to be ignorant of

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<sup>4</sup> Useful material along these lines can be obtained from important study by Ursula Giere and Adama Ouane, titled Perspectives of Literacy: a selected World bibliography prepared for the International Bureau of Education, published in Paris in 1991 by UNESCO. For additional materials see that publications report in the UNESCO Adult Education Information Notes: the country and subject entries in the Education Index; the British Education Index; International Journal of Lifelong Education, International Review of Education, Convergence etc.

<sup>5</sup> cf. J.A. Akinpelu, "The Role of Research in the discipline of Adult Education", Adult Education in Nigeria, Vol 4 Dec. 1979 pp 1-13.

<sup>6</sup> Michael Omolewa, "Current Trends in Research on Adult and Community Education" in Current Trends in Nigerian Educational Research, Lagos, Nigerian Educational Research Council, 1985.



studies being done by our colleagues and continue to reinvent the wheel. What of the cooperation and collaboration needed for research in a region that has a culture of secrecy or individualism as described by Dr (Mrs) Omotosho in her Babalawo (native doctor) syndrome in educational research ?<sup>7</sup> What of the issues of funding, and of the quality of training of researchers?

How many of us, academics, spend several hours in search of scarce fuel or chase extra sources of income to make ends meet? Do we share the burdens accompanying our unstable political systems and economic woes, teach long hours, cope with large number of students in dilapidated and congested rooms? How much time do we spend on our research? Are we influenced in our research agenda by the priorities decided by donors and governments?

What has been the status of access to books, journals, equipment and latest literature? I would advise that you also suggest realistic prescriptions, and indicate the extent to which efficiency and progress in this area is primarily a question of finance.

One area that should also deserve attention is the subject of access to research reports. I know that the Subject Index, prepared by the British Library Board, did not have entries, even in Britain, on Adult Education nor on Literacy between 1961 and 1975 even when it had entries on "Adulation" and "Adultery", and in spite of the active work of UNESCO on Literacy in Britain. Entries came only as from 1975! We may wish to discuss the issue of publishing outlets,<sup>8</sup> the provision of bibliographies and Index, where applicable.

It is imperative that your analysis should show as much awareness as possible of research published on Africa, by Africans as well as non-Africans<sup>9</sup> in form of doctoral theses, dissertations, masters' project reports, articles in learned journals, technical reports, commissioned research, books and monographs.

You may find it exciting to search several journals that published only the vol 1 no 1 issues after which all subsequent publications ceased! Equally exciting should also be the research of the established journals.

Each contributor will be free to comment briefly on the quality of the research materials, and e.g. frequency of citations, sophistication of the tool of analysis, originality of thought, etc. and comment on relevance of work. You may wish to use the model in the indexed and annotated 6 volumes of Africa South of the Sahara, Index to Periodical Literature, 1900-1970 and the two Supplementary volumes, published by G.K. Hall and Co. But let us place greater emphasis on local works, the bulk of which are unknown to the world outside, but which sharpen our focus and outlook in the region.

I am forwarding you these notes in advance to give you some idea of my thoughts on the subject. Please write to me of your wish to take part in the project by mid October. The project will be coordinated at our Department. Professor Jones Akinpelu, the most senior Professor in our Department and our current Provost of Education will be involved. So will be the Head of the Department who is also our Chief Executive. The outgoing Dean whose tenure constitutionally ended at the end of July this year, and who will now join the band of former Deans including Professor Akinpelu, Dean 1983-85, and myself, Dean 1985-87, will also be involved. We should all come together as a strong team to work for the project, mobilize resources for the much needed meeting, and prepare a good paper on behalf of Africa.

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<sup>7</sup> See H.M. Omotosho, "Research in Test and Measurement in Nigeria", Current Trends in Nigerian Educational Research, Lagos, Nigerian Educational Research Council, 1985.

<sup>8</sup> See, for example, B.O. Aboyade, Nigerian Contribution to Humanistic Studies, 1948-1975, Ibadan, University of Ibadan Department of Library Studies, 1978.

<sup>9</sup> Agneta Lind's "Adult Literacy Lessons and Promises: Mozambican Literacy Campaigns, 1978-1982" was published, for example, in 1988 by the Institute of International Education at the University of Stockholm and is part of useful work on Africa.

During the next few days I shall meet the Secretary-General of our national Commission for UNESCO and present to him a request to support some of the guests at the proposed workshop, and also enlist his cooperation for this important international UNESCO project.

I expect you to start working at one on the subject as you will be requested to send in your material at very short notice to allow it be processed for the submission on Africa before the deadline of December 1993. Please begin to think of how you can obtain travel tickets to the Ibadan workshop if it materializes. I also invite you to be more actively involved in your country's National Commission for UNESCO activities.

Please feel free to write on any subject related to this project.

May the Almighty God bless our efforts.

Thank you.

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## **Towards a Future Agenda for South African Adult Education**

Research within the Context of the Southern African Region

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### **Preamble**

This paper has been prepared for the UNESCO Institute for Education's Seminar on "World Trends in Adult Education Research" in Montreal, Canada, from 6 to 9 September 1994.

I had been asked to present a paper which reflected on an adult education research agenda within the southern African region. Within the time and resource constraints, I found this task an impossibility. The history of adult education in the region has been shaped by the historical-political context in which South Africa has been separated from the rest of the region. It was only in 1989 that the first conference of politically progressive adult educators from within South Africa met both with compatriots who were in exile and others from the region. (AALAE 1989, Walters 1989) Since then very limited opportunities have been afforded adult educators, and particularly researchers of adult education, to converse and work together. It was only four months ago that South Africa officially reentered the region as a politically legitimate partner. Both because of the lack of contact and the sparsity of relevant literature, substantial research is required in order to be able to describe with any confidence the future research agenda for the eleven countries of the region. The focus, therefore, is on South Africa within the context of the southern African region.

### **Introduction**

The aim of this paper is to develop preliminary suggestions for a future South African adult education research agenda within the context of the southern African region. These suggestions are based on an analysis of the socio-economic conditions in the region and the trends within adult education research currently. I begin the paper with some clarificatory comments on my use of the term 'adult education' and highlight certain issues that are important to me in considering research in adult education. I then present a brief sketch of the southern African region. The paper then moves to a presentation of adult education and training trends in South Africa and a reflection on the current research directions. The final section reflects a preliminary research agenda for the future.

### **Definition of Adult Education**

In this paper I use the term adult education in an inclusive way to refer to all educational provision for adults excluding formal tertiary education. I understand adult education to be an integral part of social, political, economic and cultural processes. Its social purposes can be classified into education that enhances: survival strategies that enable women and men to survive the harsh conditions in which they live. Such provision may include literacy, primary health care, and some homecraft skills; education and training for the formal and informal sectors of the economy; cultural and political education which aims at empowerment of women and men to participate actively in society through, for example, networks of community organizations, political parties and trade unions.



## **An Approach to Research**

Where is the research agenda being set, by whom, for whom, for what? I support the view that research is not a neutral, value-free-science. As Mbilinyi (1993:12) of Tanzania argues, the researchers are part of the world under study. The conception of the problem under study, the construction of the research instruments, and interpretation of data, are all affected by the multiple identities and locations of the researcher. Just as my identification of the future research agenda for the country is shaped directly by my multiple identities and locations.

The research approaches and processes need to be seen as rooted within economic, political, cultural and ideological structures of society. The discussion of research trends within South Africa and the region cannot be done outside of the historical context. What research is undertaken, how, by whom, for whom, and for what, are all shaped by specific circumstances, which include quite centrally the question of who is funding the research. Therefore, to do justice to the question concerning trends in adult education research in the very different countries of our region an indepth study would be required.

In looking at the trends in research and the future research agenda it will be important to focus not only on what is being researched, but also on who is doing the research, how its being done, why, and who is funding it.

## **South Africa within a New Southern Africa**

In this section I will briefly sketch the background to the position of South Africa within the region in order to provide the context for the discussion.

The southern Africa region has just entered a new phase with the liberation of South Africa from white-dominated, apartheid rule. On the 10 May 1994 Nelson Mandela was installed as the new State President and the head of the Government of National Unity. He is the first black, and first democratically elected, president in the history of South Africa. The other countries in the region had organized themselves in geo-political terms into the Southern African Development Coordination Conference (SADCC) in order to maximize their political clout and minimize their economic dependence on South Africa. The SADCC members had until recently a common political enemy in South Africa with whom they simultaneously had complex historical and economic relations.

The southern African region consists of 11 countries. In 1990 there were an estimated 117,4 million people in the region with 35,9 million residing in South Africa. The region is one of the least urbanized parts of the world. With the exceptions of South Africa and Zambia, the majority of the population of the countries are rural dwellers although there is considerable variation. For example, in South Africa the level of urbanization is 63,2%, in Zambia 52%, in Zimbabwe 29%, in Botswana 20%, in Mozambique 13%, and in Lesotho 6%. (Dewar 1994:280)

The problems of the states in the region are exacerbated by their specific dependency and relationship to the economy of South Africa. The SADCC's Regional Economic Survey (1988) describes the region's economies as being in a crisis characterized by weak agricultural growth, a decline in industrial output, rising unemployment, poor export performance and mounting debt as well as deteriorating social indicators, institutions and environment. South Africa has a per capita income of about US\$2 000, while a country like Mozambique's per capita annual income falls below US\$100. The total GDP of the ten other countries of the region comes to barely a third of South Africa's GDP.

South Africa's domination in the region has evolved over many decades and has been maintained through economic and military means. It has maintained its economic superiority through pressure on and coercion of the smaller and more vulnerable economies. It increasingly used military force and destabilizing tactics especially from 1980 to 1988 which contributed substantially to the destruction of the Angolan and Mozambiquan economies. Among some features of South Africa's dominance in the region are: the counter-flow of skilled persons into South Africa from the region because of the attraction of higher incomes; South Africa's control over electricity, water, minerals' marketing and even tourism; South Africa's powerful influence through the transport networks; South Africa's dominance through the Southern African Customs

Union; and superior financial and management systems and developed structures in the South African economy. (Padayachee and Motala 1994:74)

In 1994, post-apartheid southern Africa is entering a harsh international environment in the wake of the Cold War dominated by geo-economic rather than geo-political factors. The industrialized world is affording Africa only a passing glimpse as the concentrations of power are centred in three economic power points : North America, Europe, and Japan together with the Pacific Rim countries. Organized as 3 inward-looking trading blocs, these powers have created a harsh trading environment for economies like those in southern Africa that are starved of capital and heavily reliant on the exporting of primary and semi-processed goods. The protectionist attitudes of these trading blocs over their sophisticated technologies, the increasingly global financial markets, the ever more difficult nature of the aid environment, donor fatigue and the syndrome by which South Africa is regarded as 'just another third world country' will hamper and damage development efforts in South Africa and the region.

With both the changes in the global political and economic contexts and the re-integration of South Africa into the region, there is a great deal of debate and discussion about the future of the southern African region. It is clear that the problems and issues for governments of southern Africa cannot be solved by individual nation-states as the region is integrated in complex socio-historical, geographical and economic ways. Also, internationally, there is a realization that the nation-state is not as important an organizing unit as in the past. Vale (1994:xxiii) argues that national boundaries are becoming less and less significant. He believes that unique and far-sighted leadership is required to draw the people of southern Africa into a vision of a region in which borders play less and less of a role in determining political and economic outcomes.

At present the states of the region are scrambling to position themselves in a world and a region that have seen momentous change. There are different and competing views on how the future should be conceptualized. In South Africa an ambitious framework for reconstruction and development had been drawn up by the ANC prior to the elections. This has now been adopted by the new government and is known as the Reconstruction and Development Programme (RDP). The RDP is powerfully shaping the discourse in South Africa at present in almost all spheres, including adult education. Therefore, in the foreseeable future the adult education agenda in South Africa, and perhaps in the wider region, very probably will be shaped by these views.

In the next section the trends for adult education and training in South Africa are discussed within the framework of the RDP.

### **A New Approach to Adult Education and Training Within the Framework of the Reconstruction and Development Programme (RDP)**

The RDP is an integrated, coherent socio-economic policy framework that was drawn up by the African National Congress (ANC) and its allies through extensive consultation and research. It has now been adopted by the new government as its central programme of action over the next five years which aims to counter the "history of colonialism, racism, sexism and repressive labour policies". (RDP 1994:2)

The key programmes of the RDP are grouped into five major policy programmes that are linked to one another. They are:

- meeting basic needs
- developing human resources
- building the economy
- democratizing the state and civil society, and
- implementing the RDP

From an adult education viewpoint, given the three major social purposes of adult education I elaborated earlier, all five programmes will need adult educational input. But the programme most centrally relevant for us here, and one which cuts across all others, is that concerned with 'developing human resources'. Underpinning the RDP is a strong concern with redress, equity and economic development.

There is an understanding that the South African economy cannot hope to grow unless it develops the capacities to participate in the world market as an equal or on the basis of some special advantage and this cannot be done without thinking regionally. The RDP therefore argues for a southern African approach to economic development.

Within the South African economy there has been a crisis for the past two decades, and growth rates have declined dramatically. There is about 50% unemployment and widespread poverty. To create jobs and improve the living standards for the majority of people there needs to be massive economic growth. Within the RDP there is the understanding that growth can be kick-started through the rapid provision of basic necessities such as housing, water-systems and electricity on a wide scale. However, to sustain growth over a longer period industry will have to expand and be structured in order to meet the demands of new markets and new conditions.

Faced with the economic crisis, employers, organized labour, the state and other stakeholders have developed some consensus on the need for, amongst other things, a major thrust in education and training which adopts an integrated approach and which is within a lifelong learning framework. In the National Training Strategy Initiative (1994), which involved all the stakeholders, they state their vision as an approach to education and training which can meet South Africa's need for: a human resources development system in which there is an integrated approach to education and training which meets the economic and social needs of the country and the development needs of the individual.

They state that this vision requires a paradigm shift from thinking about education and training as separate entities to thinking about learning as a lifelong process. A set of principles have been adopted by the NTSI which are central to the envisaged system. They are:

1. Integration

Education and training should form part of a system of human resource development which provides for the establishment of an integrated approach to education and training.

2. Relevance

Should be and remain relevant to national development needs.

3. Credibility

Should have international and national credibility.

4. Coherence and Flexibility

Should adhere to a coherent framework of principles and certification.

5. Standards

Should be expressed in terms of a nationally agreed framework and internationally accepted outcomes.

6. Legitimacy

Should provide for the participation in planning and coordination thereof of all significant stakeholders.

7. Access

Access to appropriate levels of education and training should be provided for all prospective learners in a manner which facilitates progression.

8. Articulation

Should provide for learners, on successful completion of accredited prerequisites, to move between components of the delivery system.

### 9. Progression

Should ensure that the framework of qualifications permits individuals to progress through the levels of national qualifications via different appropriate combinations of the components of the delivery system.

### 10. Portability

Should provide for learners to transfer their credits or qualifications from one learning institution and/or employer to another.

### 11. Recognition of Prior Learning

Should through assessment give credit to prior learning.

### 12. Guidance to Learners

Should provide for the guidance of learners by persons who meet nationally recognized standards for educators and trainers. (NTSI 1994:2)

An assumption of the integrated approach is that the country requires a highly skilled, flexible workforce which can apply new production and organizational technologies within post-Fordist production processes. The new production technologies enable the production processes to be highly automated, flexible, and smaller in scale. Workers in new automated enterprises have to be able to perform a wide range of both manual and mental tasks as part of close-knit production teams. It is recognized that the impact of post-Fordism is uneven. Its impact has been greatest in strategic export-oriented industries, and in these industries it has led to an increase in education and training levels. On the negative side it has also led to deskilling of work and displacement of labour. As a consequence, there has been the informalization of economies, with growing numbers of low-wage firms struggling to survive. (Walters 1993:57)

The RDP emphasizes the need for a balanced approach which integrates reconstruction and economic development. It counters the view that growth is needed before reconstruction can take place. It argues that for the severe structural imbalances that are in the present economy to be transformed, the public sector must play a major enabling role since the market cannot be expected to make such a structural transformation on its own. The education and training system should address the needs both of the formal and informal economies. (RDP 1994:82)

The integrated approach to education and training is constructed around the central notion of a National Qualifications Framework (NQF) which will allow nationally recognized qualifications at all levels to be obtained via a multiplicity of acceptable education and training sources. The NQF would be based on a system of credits for learning outcomes achieved. A learning outcome is essentially a capability developed in the learner reflecting an integration of knowledge and skill which can be understood, applied and transferred to different contexts. Qualifications might be achieved by full time, part time or distance learning, by work-based learning or by a combination of these together with the assessment of prior learning and experience. (NTSI 1994:14)

The system of education and training embraces the whole system from early childhood development, through compulsory schooling, to adult basic education (ABE), and continuing adult education.

A system of ABE is seen as the basic phase in the provision of lifelong learning for adults. The final exit point from ABE is projected as equivalent to the exit point for compulsory education.

A key hinge in the integrated system is the educators and trainers who are called 'education, training and development practitioners' (ETDPs). This term is the product of negotiations amongst the various stakeholders and it captures the different traditions. It refers to the educators and trainers in industrial and commercial workplaces, non- governmental organizations (NGOs), community-based organizations (CBOs), technical colleges, industrial training boards, technikons, universities and other state departments. The term ETDP has been coined in order to capture an inclusive notion of the professional practitioner within an integrated education and training system.

Implicit within the RDP is a strong need for ETDPs of varying kinds to be trained. The RDP is arguing for a people-centred development process. The programme is concerned with primary health care, community development, local government, ABE, job creation, economic growth etc. In order to deliver results in any of the areas there will need to be thousands of facilitating agents in various areas of specialization, working within a range of institutions. The NTSI proposes professional development for the ETDPs and defined career paths. (Walters 1994)

The proposed integrated approach to education and training within a lifelong learning framework has been the product of numerous and varied research projects, discussions and negotiations. It is a fundamental shift from the fragmented, exclusive and partial system that has existed in South Africa.

It is an ambitious proposal to transform the education and training systems in the country. While they are still proposals, the conceptualization of education and training in these terms is already affecting the adult education and training discourse and the material reality on the ground.

The proposals are not without their critics from different perspectives. This is not the place to elaborate on these but, very briefly, there is a concern that the proposals are inevitably driven by the requirements and the logic of the formal labour market with its urban, male, production orientation. While some of the authors acknowledge the limitations of this orientation and emphasize the need, amongst others, to minimize the distinction between the formal and informal economic sectors and the necessity to meet basic needs in various ways, the power of the formal industrial frame will be difficult to contain. Even more so when the funding for this system will have to draw on the business sector to a substantial degree. This may mean that the majority of women and men who live in the rural areas and who are not in formal employment may once again miss out on adult education and training opportunities.

With this radical set of proposals for adult education and training in South Africa, a very wide range of issues has opened up which is already and will continue to set the future research agenda for some time to come. The future research, however, will need to build on what has gone before. In the next section there will be preliminary reflections on the adult education research that predominates currently.

### **Reflections on Current Adult Education Research in South Africa**

Current research in adult education in South Africa appears to be of three kinds:

1. macro adult education and training systems research;
2. concern for the adult learning and teaching encounter;
3. grassroots, indigenous research which is concerned with mobilization, organization, and development amongst the poor and marginalized sectors.

#### **1. Macro Education and Training Research**

In South Africa there has been a great deal of policy research activity since 1990, particularly amongst the ANC and its allies. The major National Education Policy Investigation (NEPI) was undertaken between December 1990 and August 1992. Twelve research groups, which aimed to involve as many people as possible from NGOs, CBOs and universities, were formed and worked mainly on a voluntary basis. The three areas of particular relevance to adult education were demarcated as : ABE, Adult Education, and Human Resource Development. (NEPI 1993) The NEPI exercise was very significant for the formation of the later ANC Education and Training Policy. It brought in hundreds of intellectuals within the democratic movement who had until then had very little policy research experience.

Another influential policy research project was undertaken by the Congress of South African Trade Unions (COSATU), in particular the National Union of Metalworkers of South Africa (NUMSA). In 1990 they undertook a participatory research project which involved 26 worker delegates in policy investigation. (Bird 1992) The proposals which emanated from this work have influenced both work within the unions and other research processes. COSATU has continued to play a leading role in the education and training policy research, debates and discussions which have lead to the NTSI and the ANC Education and Training Policy Documents.

The National Training Board (NTB) has been central in driving a very important process which included the unions, the employers and the state, and which produced the NTS. Eight work groups produced detailed proposals on policies and programmes of action.

The ANC Education Department was established soon after the organization was unbanned after nearly thirty years in exile. The department under the leadership of John Samuel then facilitated the establishment of the Centre for Education Policy Development (CEPD) which has been the main engine of education policy research over the last period. They took forward the work that had been started by NEPI and this culminated in the preparation of the ANC Education and Training Policy which was presented to the new Minister of Education soon after the new government took office in May 1994.

Policy related research has also been undertaken by some NGOs, by university departments of adult education and by the National Training Board (NTB). For example, USWE, an NGO involved in ABE, has undertaken formative work relating to ABE curricula and the professional training of ABE educators. SACHED, a nonformal education NGO, initiated an action research process to establish secondary curricula for adults using open learning methodology. The Universities of Western Cape (UWC), Cape Town (UCT), Natal and Witwatersrand, for example, have formed a consortium and are undertaking research into the development of a qualifications hierarchy for the professional training of ETDPs. (DEAL Trust 1993) The University of Natal is undertaking research into ABE delivery systems. The University of Fort Hare has an experimental ABE action research project. (University of Fort Hare 1994) The Universities of Cape Town and Western Cape are probing the social uses of literacy in a range of different work and community sites in order to answer the question why there is not more demand and utilization of the meager ABE classes that are on offer. Another consortium of organizations has been undertaking a National Investigation into Community Education (NICE 1994).

The education policy research has been undertaken with funding from international donors such as SIDA, the European Union, USAID and IDRC. National funders such as the Joint Education Trust (JET) and Independent Development Trust (IDT) have also funded some policy research and have on occasion commissioned evaluative policy studies. Except for IDRC whose main purpose is research, most of the funders are reticent to fund research projects normally. It is only at the current political juncture that policy related research has been supported by the funders to any extent.

During the policy research processes, international experiences, including that of the region, have been drawn on quite extensively. In the last twenty years several countries in the region have committed themselves to adult education as part of post-colonial reconstruction and development. There have been different success rates. The importance of comparative research studies has been highlighted for South African researchers during this time. While I am not aware of any publication which analyses and draws together the policy research in the region, I do know that experiences have been accessed in different ways by South African researchers. For example, South Africans have gone on study tours and policy conferences have been held where visitors from the countries of the region have shared their experiences and insights.

A feature of the policy research in South Africa has been that it has included little empirical investigation. It has most often been done in great haste, with relatively few resources. Much of it has involved a wide spectrum of the stakeholders. Some, like the COSATU research, was deliberately set up as a participatory research project with a strong capacity building rationale. The NEPI research process combined university-based researchers with accountability to student, teacher, parent organizations through the National Education Coordinating Committee (NECC). The NTSI has consisted of several task groups made up of representatives from the various stakeholder groups. Within the ANC, the draft policy documents were circulated, discussed and debated in ANC branch meetings and other conferences and fora. The policy research processes, while they have been very uneven, on the whole have been strong on participation but weak on the generation of new empirically based data. One of the few exceptions to this is the UCT/UWC research into the Social Uses of Literacy.

## **2. Concern for the Adult Learning and Teaching Encounter**

The main source of ongoing adult education research is through the academic study of the field. This occurs mainly, but not exclusively through the university departments of adult education. (In South Africa there are 22 universities with only five having departments of adult education.) A brief survey of some of the main research concerns of advanced diploma, masters and doctoral students of adult education at three of the universities shows a concern for the study of aspects of the learning and teaching processes themselves, including the training of educators, the empowerment of learners, the evaluation of projects and programmes, curricula development within specific sites or sectors, assessment, the organization and management of adult education, and its transformative potential.

The staff research interests within three of the departments of adult education reveal an interest to different degrees in all three categories of research. Examples of the interests in teaching and learning are:

- At the University of Western Cape: the position of women in adult education; popular educational, anti-racist and feminist methodologies; approaches to academic development within educator training programmes; distance education methodology.

- At the University of Cape Town: ABE, ranging from curricula development, to materials development; educational innovation and project or programme evaluation; experiential and self-directed learning; educating the adult educators and trainers; assessment of prior learning.

- At the University of Witwatersrand: educating the adult educators; evaluation of state provision in adult education; use of radio for nonformal education; affirmative action programmes; English language improvement; training rural education facilitators.

The research in the departments is small scale, some not funded at all, driven by personal and institutional interests of those involved, or commissioned by external agencies. There is strong interest in the area of professional training of adult educators as this directly relates to the field of practice. In general there is limited research capacity as several of the staff are on short term contracts against particular, privately funded projects. The majority of the academics are white.

The research by the graduate students is a very important source for the generation of adult education research. The move amongst four of the universities to form a consortium to undertake a short term research project on the professional training of ETDPs is an interesting approach to sharing resources and building research capacity.

### **3. Grassroots, Indigenous Research which is Concerned with Mobilization, Organization, and Development amongst the Poor and Marginalized Sectors**

In southern Africa there are many NGOs, CBOs, universities, or others, which undertake research of various kinds in order to improve the position of the poor and marginalized women and men in particular communities. They include examples like the 'Sentinel site experience in Angola' (Ruijter 1991) where a health survey was done as part of a process of social mobilization; or the Women's National Coalition (WNC 1994) in South Africa which involved thousands of women in the identification of needs which formed part of a Women's Charter; or the cooperative materials development project in Zimbabwe (Ministry of Community Development); or the research into indigenous approaches to health and healing in Africa (Mukasa 1991); or the struggles over land claims in various countries of the region. (AFRA News 1994)

There are many examples of small scale research and development projects that are most often linked into organizing and mobilizing around specific issues. They often utilize participatory or action research methodologies and are driven by specific, localized objectives. These research projects are seldom written up and disseminated through commercial channels, but are often mentioned in very local community newsletters or booklets. The research is often done for and by the people most affected by the issue at hand. Sometimes, as in the case of COSATU, research to meet particular needs of workers is undertaken in a range of different ways - through commissioning, through participatory processes etc. (Bird 1992)

### **Reflecting on Current Research and a Future Research Agenda**

The nature of the adult education research reflected above is for the most part small scale research which is done in response to particular needs at the time. It mostly reflects the very particular, localized interests of an individual, an institution or a community. It mirrors much of adult education practice which is often driven by particular social, cultural, or economic needs. Much of the research has been concerned in one way or another to contribute to social transformation, which in South Africa's case has mostly meant working against apartheid. The majority of adult education researchers in South Africa are white, which reflects the legacy of apartheid.

In a useful paper, Erwin (1992:6), a leading trade unionist at the time and now Deputy Minister of Finance in the South African government, describes research as either being able 'to lead events' or having to 'follow events in the sense of responding to research requests'. He points out that the intellectual and research community can only play a 'leading role' in favorable political and economic circumstances.

Usually it is easier for researchers to follow economic and political events and wait to be asked to do research. But, as he says, to become a mere servant of political and economic needs is 'to devalue the notion of intellect and to destroy the efficacy of research'. He argues for a balance between research that is immediately relevant to products and social needs, and that which is seeking to produce new knowledge. He believes that researchers can play a crucial role in the reconstruction and development of the country if they can help to establish the fine balance between 'being instruments of change used by political and economic forces and that of being servile to existing political and economic interests'.

Erwin argues that it is possible to be a good researcher and be politically committed. As I have stated earlier, I share the view that an adult education researcher is not or cannot be a neutral, objective bystander. The crucial questions as to where the research agenda is being set, by whom, for whom, for what, have to be confronted if research is to contribute to social transformation towards social justice. However, implicit within these questions are not simple answers. These questions do not imply, for example, that only grassroots, community sponsored research is legitimate.

I am arguing that multiple forms of research, sponsored by multiple sources are important and that empirical research that is to lead to new knowledge is as vital as the research that is localized and responsive to particular social and educational needs. One of the problems at present is that it is mainly the reactive, localized research that is being undertaken and little new, empirically based data is being generated. One of the reasons for this is obviously linked to the funding of research.

### **A Future Research Agenda: South Africa in the Context of the Southern African Region**

The adult education and training research agenda has to keep the material realities of the region in mind. These are the economic crisis, the poverty, the domination by South Africa, the global environment, the violence, the diversity, the racism and sexism, and the new hope and opportunities that political change in South Africa opens up for rethinking relationships in the region.

In this preliminary analysis it seems to me that the critical areas for short and medium term action that the research agenda needs to address are :

#### **1. Collaboration amongst Researchers in the Region**

Because resources are scarce, the field is marginal, and the community of researchers is fragmented, particularly with the divide until very recently between South Africa and the SADCC countries, the resources that are available within universities and other institutions in the region need to be developed and utilized to better effect. Research and

professional networks which can help to build the research community need to be explored and extended.

This can be done in various low-cost ways by utilizing, for example, the function of external examining, sabbaticals, and attendance of conferences in the region. Staff and student exchanges should be explored. Experiences from other regions of Africa and the world could help to inform the formation of appropriate strategies. The development of local outlets for sharing research through local conferences and publications needs also to be acted upon.



## **2. The Status of Adult Education and Training**

Adult education and training has marginal status in the countries of the region. In some of the countries it has had official status, as in for example Namibia and Botswana, where there are government structures and official funding mechanisms. In some countries, like Mozambique, it had high status but this has been eroded. In South Africa, for the first time, there is a chance of it obtaining some state recognition.

While I am aware of some initial work done on the political economy of adult education (e.g., Youngman 1992, Mudariki 1992), comparative studies on the histories of adult education policy and systems development in the countries of the region would be both illuminating and significant for thinking about the future of adult education and training in the region. As Mundy (1993) argues, adult education and

training is shaped by complex economic, political and social imperatives.

## **3. The Professionalization of the Field**

Within adult education there is the tension between adult education as part of a social movement and adult education as a profession. Within South Africa there is a strong move towards the professionalization of the field. What are the implications of this? What are the possibilities and prospects for the development of an integrated practitioner, the ETDP? How does this development work alongside the informal nature of much of adult educational practice? etc.

The hierarchy of professional training courses for adult educators and trainers need to be developed within which are imbedded many questions relating to the curricula, delivery, methodology etc. Key concerns in terms of equity and redress relate to affirmative action. This includes training of black adult educators and those based in the rural areas to become senior managers, organizers and researchers within the field. Progress needs to be monitored and evaluated in order to ensure positive results. Adult educators need to research and develop effective methodologies which challenge racism, sexism and other forms of chauvinist behaviour.

## **4. Adult Literacy and Basic Education**

Within the literature ALBE is one of the most frequently addressed subjects. While more may have been written about literacy than any other aspect of adult education, as Rogers (1993:172) argues, 'we do not know what we are doing, why we are doing it, how well we are doing it or what the results will be if we do it well'. Clearly, there is a need for very carefully formulated research in order to dig much more deeply into all aspects of ALBE. The one research approach which is attempting to do this is the Social Uses of Literacy Research which follows work, for example, of Brian Street (see Breier 1994) and is currently being undertaken in different parts of the world, including South Africa.

## **5. Integration of Adult Education and Training**

The powerful proposals for the integration of education and training in South Africa reflect trends in some other parts of the world, like Britain, USA, and Australia. They reflect particular understandings of the developments within the global economies. They argue for competency-based education and training which allows flexible access to educational opportunities. The system is constructed around a National Qualifications Framework.

As (Edwards et al 1994) argues, the competency-based approach to education and training offers many opportunities and values which most adult educators espouse relating, for example, to access. However, the approach also holds many dangers. Education and training can become fragmented and can become primarily labour market driven. These radical proposals open up a host of research challenges both for the setting up of the system, the delivery, and the evaluation of its component parts. If the system is not to perpetuate an urban based, formal sector, male bias then it will need to be monitored and developed in an ongoing way.

The integration of education and training offers an opportunity and a challenge for adult education to move from its marginal status in order to grapple with issues both integral to economic and social development.

## **6. Education and Training for Employment and Employment Creation**

The levels of poverty within the region point to a major concern about education and training for employment and employment creation. (IFEP 1990, Kaliyati 1994) Research into vocational education and training in both the formal and informal sectors will need to be deepened and extended. Adult educators often are not involved in these issues as they are left to 'human resource development practitioners', but implicit within the integrated approach to education and training is an active engagement by practitioners across different sectors. Concerns with economic development need to become foregrounded in the research of adult educators.

With the very high levels of unemployment and the changing economic landscapes globally and regionally, mobility of the population between the formal and informal sectors is a reality. Women are in the lowest paid jobs, have limited education and training opportunities, and are increasingly the heads of households. Research is required into education and training for mobility between sites of work. Also the position of women in the economy and the ways of improving it, need far more concentrated research effort.

The advance of black people through education and training into higher levels of management of the economy needs to be developed, monitored and evaluated on an ongoing basis in order to counter the white, male hegemony that operates presently.

## **7. Democratization of Civil Society and the State**

Spaces have been opened within the mainly authoritarian states of the region for greater and more effective participation by community based organizations, NGOs, and individuals in various aspects of social development. This is happening for a range of complex reasons, but one of them is as a response to the growing poverty and erosion of social programmes which has resulted from the imposition of structural adjustment programmes. Women and men are increasingly having to fend for themselves as the governments are unable to provide even the most basic social services.

There is growing concern amongst CBOs and NGOs at the implications of the globalization of the economy and the dominant role played by the major international finance brokers. (FCR et al 1994) Organizations within civil society have begun to develop new alliances in order to build their power bases and make their voices heard.

The strengthening of organs of civil society which are concerned with redress, equity and development is an important goal of adult education research. There are long traditions of adult education as integral to social movements for peace and social justice. (Matiwana 1989, Walters 1989) Research that can monitor, evaluate, and contribute to the ongoing building of people's ability to participate actively in shaping their societies must continue. This type of research is often not easy to fund. This only heightens its importance.

## **8. Mass Education Programmes**

Ongoing research and development is needed in order to continue to improve the efficiency and effectiveness of mass education campaigns which need to reach the masses of rural and urban-based people. In order, for example, to help to counter the AIDS epidemic, or to educate for democracy as part of local or national elections, approaches and methodologies need to be honed, particularly using new and appropriate technologies. Ongoing research and development is required around delivery of mass programmes both to evaluate what has been done and to investigate the use of new, low cost technologies.

## **In Conclusion**

I have argued that the discussion of research trends within South Africa and the region cannot be done outside of the historical context. What research is undertaken, how, by whom, for whom, and for what, are all shaped by specific circumstances, which include quite centrally the question of who is funding the research.

At this time adult education and training is still a marginal activity in South Africa. Little funding is available for research. What is, is directed towards the priorities of the funding agents.

I have suggested that the adult educators in the region need to become more active in developing a research community in order to maximize the use of scarce resources. By doing this it may be more possible to develop innovative and collective ways of undertaking research which is able to establish the fine balance between what Erwin refers to as 'being instruments of change used by political and economic forces and that of being servile to existing political and economic interests'.

A preliminary agenda for research is presented taking into account some of the major economic and political imperatives in the region.

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## **Regional Study on Research Trends in Adult Education in the Arab States**

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## Introduction

This paper is prepared as a regional contribution to the project entitled “World Trend Analysis on Educational Research in Adult Education”. The project was initiated to achieve the goal of, “strengthening the impact of educational research on development of Adult Education and of Adult Basic Education, and to assess the present and possible contribution of universities and other research centres to such development”.<sup>1</sup>

The UNESCO Institute of Education intended by this paper to collect a comprehensive integrated data on educational researches in adult education, from all individual Arab States and from their collective efforts as a unique part of the world, and to prepare a regional trend analysis accordingly.

To prepare this paper, contacts through visits and correspondence with those who are concerned in the Arab States took place. The aims of these contacts were to discuss matters, exchange ideas and collect documents and information. Visits took place to 17 educational research, information and documentation centres in 6 Arab countries: Jordan, Syria, Egypt, Tunisia, Sudan and Bahrain. (Appendix A).

Bibliographical data, abstracts and, when possible, the full texts of educational researches were collected from 20 Arab countries covering the period 1900 - 1994. 7545 educational researches were identified and reviewed, only 130 of them were devoted to adult education issues. It represents about 1.7% of the total identified educational researches. Bibliographical data for the adult education researches was prepared and attached to this paper in Appendix B.

Detailed information from 34 Educational Research centres, distributed over 17 Arab countries, were made available for the study. The information includes: Historical background, objectives, functions, organizational set-up, constraints and achievements of each centre. Name, affiliation and date of establishment of these centers are indicated in table 2.

The paper gives a stock taking of adult education research in Arab states, and a short review of educational development as a whole, and adult education in particular. A separate chapter was devoted to educational research with emphasis on adult education. The main purpose of these reviews was, to set up a platform that facilitates trend analysis, to pave genuine ways and means for the promotion of educational research, at both the national and regional levels.

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<sup>1</sup> UNESCO, General Conference, decision (26 c/5 01334)



## Chapter One

### Adult Education in the Arab States

#### I. Arab Region

The twenty countries comprising the Arab Region<sup>2</sup>, encompass a huge area, stretching from the Atlantic Ocean in the West to the Arabian Gulf in the East, and from the Mediterranean in the North to Sub-Saharan Africa in the South. They cover a total of 13.5 million square kilometers. Much of this area is desert or semi-arid land, but also contained within its boundaries are large areas of arable land. Due to the region's scarce water resources and large areas of deserts, only about a quarter of all land is cultivated.<sup>3</sup>

1. Despite the efforts of many Arab governments to move towards food self-sufficiency, the agricultural trade deficit of the Arab states increased from 16.219 million dollars in 1977, to 18.989 million in 1988<sup>4</sup>. This trend has been exacerbated by desertification, adverse weather conditions, dependence on imported agricultural inputs (such as fertilizers, seeds and equipment), population growth and regional conflicts. The Gulf war, for example, devastated much of Iraq's irrigation and drainage facilities. Given this situation, food security remains a priority of most Arab governments.
2. Famous of its extensive oil resources, the region possesses 57.3% of the world's proven oil reserves and has sufficient known reserves to last for 113 years assuming 1991 production level.<sup>5</sup> Other resources include natural gas, as well as phosphates, hydrocarbons, iron ore and other minerals.
3. The region's population increased from 124 million in 1970 to 240 million in 1993. At current growth rate levels, that figure will rise to 289 million in the year 2000 and to 493 million in 2025. The states making up the region vary in size, from around 60 million inhabitants to fewer than 0.5 million, the average annual growth rate in the region is 2.7% but varies from one state to another. While 62% of the region's population inhabited the rural areas in 1970, the percentage dropped to 55 by 1985. It is expected to become 46% in the year 2000.<sup>6</sup>

The often diverse populations living in this region are united by the rich and illustrious history; by a common language: Arabic; and by the regions dominant religion Islam.

4. In the 1980s the Arab States Region faced a number of problems which made extra efforts necessary for economical and social development: Oil prices, the main source of wealth for some states, fluctuated considerably; drought and famine beleaguered other states; and still others suffered from unemployment and internal or cross-border conflicts. Recent events and hostilities in the Arab States Region in 1990 and 1991 have increased the demand for rehabilitation and reconstruction and further, highlighted the indispensable

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<sup>2</sup> Algeria, Bahrain, Djibouti, Egypt, Iraq, Jordan, Kuwait, Lebanon, Mauritania, Morocco, Oman, Qatar, Saudi Arabia, Socialist People's Libyan Arab Jamahiriya (Libyan A. J.), Somalia, Sudan, Syrian Arab Republic (Syrian A. R.), Tunisia, United Arab Emirates (U. A. Emirates) and the Republic of Yemen (Yemen) in addition to Palestine.

<sup>3</sup> League of Arab States, High level Arab Meeting for the welfare, protection and development of children.

<sup>4</sup> FAO, Regional Food and Nutrition Programme in the FAO Near East Region.

<sup>5</sup> ESCWA, survey of economic and social development in the ESCWA Region 1991 (summary).

<sup>6</sup> UNESCO, ED-94/MINEADRAB/REF 2. Section I

role of education in the promotion of a culture of justice and peace in the region. More harmonious and integrated educational policies are clearly needed if the challenges of the twenty-first century are to be met with an adequate level of preparation.

## **II. Educational Development<sup>7</sup>**

5. One of the most important achievements in the Arab states during the last two decades is the considerable quantitative expansion of education. The total number of students enrolled in all three levels of formal education more than doubled from 23 million in 1975 to 49 million in 1991. Between 1975 and 1991, it increased annually by an average 1.6 million. The annual average growth reached 4.8%, some 2.7% points higher than the 2.1% annual average growth of school-age population.
6. The total annual of growth of first-level school enrolment in the Arab states as a whole reached 3.8% on average between 1975 and 1991, while the average population growth in the age-group 6-11 was around 2.8%. The number of pupils nearly doubled from 17 million in 1975 to 31 million in 1991 and expected to reach 39 million in 2000 and 53 million in 2025. Notwithstanding, enrolment rates of cohort 6-11 years reached only 60% in 1975, rising to only 77% in 1991. If present policies remain unchanged, the enrolment ratio of children aged 6-11 will be 78% in the year 2000.
7. Despite the marked improvement in the education of girls in the past two decades, their situation remains relatively poor compared to that of boys. Whereas the female ratio was 54% in 1975 rising to 75% in 1991, the corresponding ratio for males was 85 and 92. While some 22% of the region's children in the 6-11 age cohort will not be enrolled by the year 2000, the majority of the unenrolled will continue to be girls if the prevailing situation remains unchanged.<sup>8</sup>
8. Enrolment grew quickly in the secondary level between 1975 and 1991 (6.0% per annum). This increase was still higher than the corresponding growth rate of the population aged 12-17. The number of secondary-school students increased from 5 million in 1975 to 15 million in 1991. It is expected to reach 22 millions in the year 2000 and 33 million in 2025.
9. Secondary enrolment is characterized by a marked imbalance between general and vocational: 88% for the former, only 11% for the latter. Of these 11%, more than half specialized in commercial (secretarial) education. Industrial education accounts for 25%, agricultural education for 10% and home economics and other subjects for some 4%. Enrolment rates of females in technical and vocational secondary education are considerably below those of males. Specializations are typically secretarial/clerical, nursing, home-economics and others which correspond to jobs traditionally held by women in the region.<sup>9</sup>
10. For the period 1975-1991, tertiary enrolment grew relatively uniformly from 900,000 in 1975 to 2.5 million in 1991, a 184% increase. The majority of Arab higher education students specialize in the humanities and social sciences. A noticeable improvement has occurred in female participation in higher education, from 28% of total students enrolled in 1975 to 37% in 1991.<sup>10</sup>

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<sup>7</sup> UNESCO / ED-94/MINEDARAB/3 P.P. 6-7

<sup>8</sup> UNESCO/ED-94/MINEDARAB/REF 2 Section 3.2.2 and figure (4)

<sup>9</sup> UNESCO/Ibed section 3.2.3

<sup>10</sup> UNESCO/Ibed section 3.2.4

11. Public expenditure on education as a percentage of GNP, which has fluctuated during 1970, 1975, 1980, 1985 and 1988, respectively from 5.0%, 5.9%, 4.4%, 6.0% to 6.4%.<sup>11</sup> This record indicates that "Arab States have one of the world's highest rates of investment in education. At 6.4% in 1988 of the area's total GNP, it is second only to North America."<sup>12</sup> However, most of the non-oil-producing Arab states suffer from scarcity of financial resources allocated for education.
12. Yet despite the achievements of the past two decades, education in the region faces persistent problems and challenges. The universalization of primary education and the eradication of illiteracy are, as yet, unattained goals, and wastage rates resulting from drop-out and repetition continue to be high. More efforts are therefore needed for improving the quality of basic education, curriculum, methods, materials, pre-and in-service teacher training etc.

### III Adult Education

13. Adult education in the Arab Region is predominantly in favour of adult literacy work. This is due to the fact that illiteracy has been, since a long time, the dominant feature of most Arab societies. In 1970 the number of illiterates in the Arab States reached some 50 million, accounting for 73% of the total Arab population aged 15 years and over. Although the percentage of illiterates dropped to 48.7% by 1990, the absolute number increased to 61 million reflecting an increase in population. All related projections indicates that if the situation remains as it is, the number of illiterates will rise to 66 millions in the year 2000. Women accounted for 62% of the total number in 1990.
14. Since the early 50s some Arab countries started its efforts to eradicate illiteracy. They have often used schools as a model. If adults missed schooling, they were given a second chance, schooling was repeated for them, complete with classrooms, rows of desks, teachers, text-books and teaching methods drawn from the pedagogy of teaching children. After a long experience with fundamental education, community development and functional literacy, an Arab strategy for literacy was born in 1976. The strategy was greatly influenced by the theory of andragogy, which was moving towards the creation of learning approaches appropriate to adults.
15. The late 70s and early 80s witnessed the adoption of the new strategy by most of the Arab States. (Former) Democratic Yemen, Iraq, (Former) Arab Yemen, Somalia, Sudan, Mauritania and Palestinians in Lebanon, launched comprehensive national literacy campaigns.  
Other Arab countries, although they did not organize massive campaigns, yet their regular programmes were influenced by the theory of comprehensive confrontation, which was the means to achieve "cultural literacy". Millions of illiterate Arabs joined these programmes and campaigns.
16. At the theoretical level "cultural literacy" was clearly formulated, through workshops, pilot projects, experimentation etc., as a pure andragogical action for adult education. But in practice literacy programmes were very much influenced by the school model. The Arab Regional Literacy Organization (ARLO) and the UNESCO Regional Office for Education in the Arab States (UNEDBAS) and other agencies worked hard to promote the performance of literacy and adult education activities in all Arab States. Conferences, meetings and direct expertise services in planning, curricula development, training of

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<sup>11</sup> UNESCO, World Education, Report 1991 (Paris UNESCO 1991) P. 36.

<sup>12</sup> League of Arab States, High level Arab Meeting for the welfare, protection and development of children.

- personnel, publishing and exchange of experiences were implemented widely within the on-going campaigns and programmes. Unfortunately, the crisis of the 80s weakened most of these activities. The trend splitting theory and practice, remains unchanged.
17. It is now apparent that literacy and adult education programmes in the region were characterized by two dominating trends. The first is the massive campaigns trend which enrolls illiterates in literacy classes for a short period, followed by post-literacy activities. Normally this trend is characterized by a high rate of relapsing back into illiteracy, due to the poor post-literacy activities. The second is the continuing literacy and adult education evening classes, which most of the rich gulf-states are organizing. This trend is abiding by and committed to formal education, following the same curricula, teaching methods and means of evaluation, using the same schools, facilities, materials and teachers. It suits special group of participants, usually young people or those in-need of formal certificates.
  18. Though literacy work is very much influenced by the school model, yet, significant experiences were recognized in the region. Namely, the Rural Cultural Literacy Project in (former) Yemen D.; the use of recorded cassettes in literacy work with drivers in Iraq; post-literacy women training in Syria; adults' new learners library (ARLO); summer literacy campaigns in Saudi Arabia, continuing education courses in Bahrain; etc. Such experiences will be the base for future development of adult education devoted to illiterate adults.
  19. A questionnaire was sent by UNESCO/Amman in 1989 to all Arab States on the status of basic education and literacy.<sup>13</sup> Seven factors were fingered as the major constraints to developing literacy and adult education:
    - (a) the political will backing the universalization of basic education has in most countries not been translated into action programmes backed by adequate financial and human resources;
    - (b) motivation for acquiring basic literacy and numeracy is generally low among the target population;
    - (c) with the emphasis on formal education, support for bodies responsible for literacy and adult education is limited;
    - (d) literacy education is limited to traditional delivery systems with no evidence of innovation;
    - (e) the quality of programmes, materials and teaching methods is generally poor;
    - (f) programmes to support post-literacy campaigns are less than fully effective; and
    - (g) personnel involved in literacy and adult education - teachers, planners and administrative personnel - are not adequate to the challenge.
  20. Types of adult education other than literacy, are rarely recognized as an adult education education activity. However, a study on adult education institutions in the Arab Home land, based on a field survey identified 5888 institutions in 19 Arab countries.<sup>14</sup> The density of such institutions varies greatly from one country to another: While one countries identified only 2 institutions as adult education institutes another one could identify 2417. The study classified these institutes into four types:

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<sup>13</sup> UNEDBAS/3, ibed p.10

<sup>14</sup> Hashim Abuzeid El-Safi, Non-formal Education in the Arab Region (Arabic), Education of the Masses, Specialized periodical, Published by ARLO, NO.25 PP 125-141.

Type	number	%
1. Educational	3495	59.4
2. Vocational	1088	18.5
3. Cultural	429	7.3
4. Social	876	14.8
Total	5888	100.0

The study specified the basic functions and programmes carried out by the analyzed adult education institutions according to the four classified types.

21. The most important function of the **educational institutes** is to provide literacy skills for those who missed the chance of education in their childhood. Then comes training to achieve better standard at work; civic and family education, community development and house-hold education, which comes in some countries as the first function:  
The programmes offered by the educational institutes comprise: teaching basic tools for reading, writing and calculating; general knowledge; languages; administration; mathematics; religious education, teacher training; working with rurals; cooperatives; training for community development; community leaders; popular universities; specialized studies, correspondence study programmes; mass-media educational programmes and educational programmes for soldiers and prisoners.
22. The main functions of the **vocational training institutes** is the training of workers and farmers; women's activities; quality training to enhance personal capacities; workers' education and rehabilitation.  
These functions are reflected in the programmes implemented by this type of institutions. Workers and technicians receive courses and practice training in printing, carpentry, surveying secretarial work, technical drawing, electronics, welding and building. The programmes of this type of adult education includes also activities like cutting-out and sewing, knitting, weaving, first aid and nursing.
23. The basic functions of the **cultural institutes** are general and specialized knowledge, religious education, civic education and women's activities. Lectures, panels, film-shows, publications, mass-media, exhibits, museums, mobile campaigns, libraries and theatre are the main channels for health education, agricultural extension and workers' education. Some cultural activities in favour of heritage resurrection in poetry, religion, history and literature are practiced through informal channels.
24. As for the **social institutes**, the main function are the development of local communities, the promotion of physical education and sports, social welfare and the patronage of the scout movement. It is, in fact, a combination of health, family and communal activities, carried out in cooperation with local societies, confederations, trade unions, youth camps, women's organizations, red crescent and community development committees.
25. 68.7% of these institutes are sponsored through governmental bodies. 11.8% have co-sponsor supervision, while only 19.5% are sponsored by NGO's. However, adult education institutions are never coordinated in any of the Arab States. The one central coordinating body, which shoulders policy making, or planning or even coordinating, never exists in any of the Arab states. Attention was given to central adult literacy bodies, which are normally affiliated to the Ministries of Education and in some cases to Ministries of Social Affairs as in Morocco and Tunisia, or to the Ministry of Culture as in Syria.

26. The National Literacy body comprises, usually, a **council and a department**. The **councils** differ in composition and responsibilities from one country to another. Mostly the council is composed of representatives from all concerned authorities which are interested in literacy. Their membership is not conditioned by their actual role in presenting education for adults, but by their potential role in participating in literacy work. Radio, TV, armed forces, police, popular organizations for women, workers farmers and some times representatives of universities and colleges. The **department** is a governmental section of the concerned Ministry headed by a director and some specialists in training curricula and supervision, with administrative agents in the regions. The departments are usually understaffed and poorly trained with low motivation. Their concern is only directed to literacy classes.
27. Most of those who are working in adult education activities other than literacy, are not aware of their relation to education. It is worthwhile to mention here, that out of all divisions and departments included in 45 faculties of education, based in 14 Arab countries, only three divisions have connections with adult education: the faculty of education in Al Madina Al-Munawara (Saudi Arabia), the faculty of education in Khartoum University (Sudan) and the faculty of education in El-Azhar University (Egypt). The two former ones have divisions of adult education, while the latter has a division of community development and adult education.<sup>15</sup>

## Chapter Two

### Educational Research in Adult Education

#### IV Educational Research

28. Educational Research is not a sole responsibility of the Ministries of Education (MOE), or the Educational Research Centres (ERC) which are affiliated to the MOE. Universities though faculties of education have played a significant role in promoting educational research in the Arab region. Most universities have their own ERC. Apart from that, educational research activities are regularly carried out by graduates as thesis requirement for MA or Ph.D. degrees. This study dealt with 7545 educational studies, most of which were carried out by students. During colonialism the majority of the research was carried out abroad, and only gradually Arab Universities took over.
29. The National Centre for Educational Research and Development, affiliated to the MOE in Egypt and established in 1956, marked the institutionalization of educational research in the Arab region. Some qualified ERC were identified, in this paper, from 16 Arab countries (Appendix -c-T.2). In the following table these centers are classified according to **affiliation and date of establishment**. MOE are sponsoring the majority of these centres, while universities sponsors about one quarter. Only one institute is acting independently. About half (44.1%) of these ERC were established during the past decade (1980-1990).

Affiliation	1956 1979	1980 1990	N.S.	Total
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Panel on the Role of the Faculties of Education and Educational Research Centres in the Arab Home-Land, in Promoting Primary Education and Literacy (Manama - Bahrain 10-13 May 1993). Conducted by ALECSO: Policies, fields and priorities of educational research in supporting universalization of primary education and literacy in the Arab home-land.

				No.	%
1. MOE	8	9	4	21	61.8
2. Universities	4	4	-	8	23.5
3. Other bodies	1	1	2	4	11.8
4. Independent	-	1	-	1	2.9
Total No.	13	15	6	34	
%	38.2	44.1	17.7		100

30. As for the **functions of the ERCs and faculties of education** in the Arab universities in the field of educational research, "there exists a striking similarity in the researches carried out in the different Arab states. Most of them include curricula and textbooks development of all levels of educational system, and conduct applied research directed to tackling the practical teaching/learning problems. Besides the aforementioned, common concerns shared by all institutions, some of them have direct involvement in such activities as research in teacher training and educational planning and evaluation, whereas, in some other countries research in these areas are directly carried out by one of the departments within the MOE".<sup>16</sup>
31. A recent study collected information from 31 ERCs and faculties of education.<sup>17</sup> In concern with **objectives and responsibilities** of these ERCs, the study found that all faculties of education are mainly engaged in providing the required man power at all levels of the education system. Educational research through post-graduate students or professors is considered as one of their responsibilities. Objectives and responsibilities of the ERCs are very similar to each other. The most important are:
- (a) to conduct educational research, studies and surveys and to publish them;
  - (b) to exchange information and experiences;
  - (c) to organize conferences, panels and meetings on educational research issues;
  - (d) to train personnel; and
  - (e) to cooperate with the authorities concerned with curricula development, teachers' training and preparation of text books.
- Some ERCs added: Question banks (Oman); data base (Jordan) and TV programmes production (Tunisia).
32. The examined educational research, as reflected through many studies and meetings dealing with the subject, include most aspects related to various levels of every type of education. The following six **areas were commonly covered by the educational research**:
- (a) curricula, teaching methods, educational approaches and aids;

<sup>16</sup> The Regional Seminar on the Role of Educational Research Institutions in Developing Basic Education in the Arab States. (Amman-Jordan 15-19 Dec. 91). Conducted by UNESCO (EIPDAS): The Final Report. (Arabic - English) 19 Dec. 1991.

<sup>17</sup> Panel on the Role of the Faculties of Education and Educational Research Centres in the Arab Home-Land, in Promoting Primary Education and Literacy (Manama - Bahrain 10-13 May 1993). Conducted by ALECSO: Towards an effective role for the Faculties of Education and Educational Research Centres in the Arab Home-Land in the Universalization of Basic Education and Literacy (Field Survey).

- (b) teacher's pre- and in-service training;
  - (c) educational administration and supervision;
  - (d) educational policy and planning;
  - (e) evaluation and examinations (student achievement);
  - (f) literacy, adult and continuing education (after 1990).
33. Few research has been conducted in the areas of:
- (a) educational facilities;
  - (b) educational cost;
  - (c) individualized instruction and its technologies;
  - (d) educational wastage (drop-out);
  - (e) education of girls and women;
  - (f) education of disadvantaged groups;
  - (g) unconventional alternatives for formal basic education;
  - (h) Education Management Information System (EMIS)
34. The regional seminar<sup>18</sup> analyzed the **constraints that face ERCs** in the Arab states. The majority of these constraints stem from organizational and administrative structures of the research institutions, and are generally related to such primary factors as:
- (a) lack of funds;
  - (b) qualified technical personnel;
  - (c) material facilities;
  - (d) inadequate national or regional coordination; and
  - (e) inappropriate communication between researchers and decision makers.
35. Lack of dialogue between researchers and policy makers is generally embedded in the fact that research institutions are generally in liaison with the middle level cadres in the administrative hierarchy of the MOE and consequently have **no direct link with the high ranking policy makers**. This is perhaps one of the main reasons why the ERCs have generally not been able to address the long term or immediate information needs of the decision makers, and to provide them with research findings in due time.

## V Research in the Field of Adult Education (AE)

36. Similar to all educational research, the main source of adult education research are ERCs and faculties of education in universities. As we have mentioned before very few faculties of education are concerned with adult education. ERCs are also paying little attention to AE. In the aforementioned study<sup>19</sup>, only four ERCs in the region were considering literacy and AE as one of their responsibilities. The educational research division in the **Jordanien** MOE is committed to reduce illiteracy rate from 16% to 8% by the year 2000. One of the main objectives of the National ERC in **Egypt** is to conduct field experiments and research to develop literacy work. In **Yemen** the national centre for educational research and development is authorized to cooperate and coordinate its effort with the concerned bodies to conduct research that promotes the activities related to non-formal education. The National Educational Institute in Mauritania is also committed to literacy work. 80% of the ERCs in the Arab States are not mentioning any responsibility in the field of adult education.
37. The study identified 130 research activities in adult education in the Arab region. The analysis shows that nearly half of these activities (47.7%) were carried out by post-graduate students. This trend was common before the 80s (64.3%), but, dropped to 40.7%

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<sup>18</sup> See footnote 16

<sup>19</sup> See footnote 17



during the 80s and to 37.9% during the 90s. ERCs and Ministries of concern began to play a better role in the 80s, and even more after the 80s.

	Research authority	1946 1979	1980 1989	1990 1994	TOTAL
		No. %	No. %	No. %	No. %
1	Post-Graduates Researches	27 64.3	24 40.7	11 37.9	6.2 47.7
2	Educational Research Centres	13 31.0	15 25.4	3 10.3	31 23.8
3	Ministries of concern	2 4.7	9 15.3	10 34.5	21 16.2
4	Individuals	- -	11 18.6	5 17.2	16 12.3
	Total No	42 100	59 100	29 100	130
	%	32.3	45.4	22.3	100.0

38. To assess the **purpose** of the educational research in the field of AE, the following table shows the trends in this respect:

Purpose	No.	%
1. Applied or field research	75	57.7
2. Basic or fundamental research	29	22.3
3. Evaluation research	15	11.5
4. Comparative research	11	8.5
Total	130	100.0

Applied and field research is the most dominant kind, whereas **action research** and **participatory research**, which is more relevant for adult education, are not commonly used. It is clear that these two approaches are related to local communities or class room problems and usually have to be conducted by grass-root level workers. But no evidence is available to prove that action research or participatory research were practiced in the region.

39. As for the **methods** used, the absolute majority of the analyzed researches are based on the **descriptive research method**. Only 4.6% of this research used the **experimental method** and 3.1% used the **historical method**.

40. Adult education is practiced in different manners according to target groups or to its delivery systems. The following table shows the connection of research to the different approaches of adult education.

Approach	No.	%
1. Literacy	59	45.7

2. Adult education	45	34.9
3. Non-formal education	10	7.8
4. Community development	6	4.7
5. Life long/continuing education	5	3.9
6. In-formal education	2	1.5
7. Fundamental education	2	1.5
Total	129	100.0

The majority of the research was devoted to literacy, and this is acceptable in the light of high illiteracy rates in the region and the commitment to the provision of Education For All. The neglect of approaches like lifelong and continuing education which is normally characterizing the efforts of universities in AE, and in-formal education which characterizes AE through mass-media or communal activities draws the attention to promote researches in this direction.

41. The research under review covered the following areas:

Areas	No
1. Curriculum, material, methods and aids	19
2. Present situation and problems	17
3. Mass media, motivation and mobilization	15
4. Strategy, policy, planning and costing	16
5. Learning needs	9
6. Vocational, technical education	8
7. Training	7
8. Social work	7
9. Research	7
10. Modernity, Socio-economic development	6
11. Attitudes and participation	5
12. Organization and women	6
13. Statistics, networking	3
14. Islam	2
15. Learning assessment	2
Total	129

It should be pointed out, that research efforts have not been devoted equally to all important areas of adult education. This apparently reflects the lack of planning and coordination.

## VI Trend Analysis

### 42. Trend 1. **Little attention is devoted to Adult Education research in the Arab region.**

By and large, this trend stems from the marginal status of adult education. As a matter of fact, educational systems in the Arab Region are biased towards formal education. Most of adult education activities are practiced with little or no official recognition. Universities and ERCs do not include AE within their objectives. Therefore research in the field of adult education is lacking proper attention in planning and coordinating. This is quite evident through the percentage devoted to such research in comparison to other educational research.

### 43. Trend 2. **Adult education research is concentrated on literacy issues.**

Of course, literacy is an important area of AE. Nearly about half of the adults in the region are illiterates, therefore, literacy as basic adult education should have a high priority. But, other programmes including post-literacy programmes are equally important for the progress of every citizen, including the neo-literates themselves.

Taking into consideration the concept of life-long education, AE programmes are meant to meet the regenerated learning needs for all: to provide a wide spectrum of programmes for the growing number of those who completed secondary education and joined work (20 millions), to compensate vocational and technical education, and to find new roles for women and girls. Research efforts should cover equally all levels of AE programmes.

### 44. Trend 3 **Weak or no connection between research findings and decision making**

This disconnection is attributed largely to the lack of dialogue between middle level cadres of researchers with the high ranking policy makers. This paper draws the attention to the serious gap between research and practice. Lack of communication could not be simply attributed to the status of researchers and policy makers. A recent paper attributed this to the following: "researchers have tended to work narrowly within their own discipline and not be aware of relevant development in other fields ... lack of communication may mean that research lag behind the insights driven from practice, or that practitioners are unable to take advantage of ideas developed elsewhere."<sup>20</sup>

### 45. Trend 4 **The inadequacy of the data base on AE**

Apart from statistical data collected from literacy classes in each individual country, no other information is available on other types of AE. The only study on adult education institutions in the the Arab home land<sup>21</sup> was never repeted. Information on AE research have no chance in separate bibliographies, leave alone abstracts or circulation and dissemination of information about such researches.

### 46. Trend 5 **AE research is overwhelmingly conducted through descriptive methods of research**

The nature of a study's problem determines mostly the method or methods to be followed. According to the weak institutionalization of research work in adult education, problems

<sup>20</sup> David Barton and Mary E. Hamilton, *Researching Literacy in Industrialized Countries, Trends and Prospects*. UNESCO Institute for Education, Hamburg. 1990 P. 5.

<sup>21</sup> Hashim Abuzeid Elsafi, *Non-formal Education in the Arab Region (Arabic)*, Education of the Masses, Specialized periodical, Published by ARLO, NO.25 PP 125-141.

that need control and manipulation of variables might be avoided. Evidence is clear through low percentage of research conducted through **controlled experimental methods**. Also, as a result of the lack of experienced well trained field workers, **action research** and **participatory research** were not used inspite of their vital role in solving local problems scientifically.

47. Trend 6      **Lack of planning and coordination in channeling AE research**  
Research conducted according to priorities and coordinated plans could achieve specific targets and promote action. This happens in a networking system, linking ERCs with each other, and with AE authorities at the national level, through plans responding to needs of local communities, and strong coordination between national practitioners and grass roots workers with women, labourers, farmers through local community action. Regional coordination should start from the field, but not the other way round.

## Chapter Three

### Promotion of Educational Research in Adult Education

#### VII Measures for Development of ERCs in the Arab States

The participants of the Regional Seminar on the role of educational research institutions in developing basic education in the Arab States<sup>22</sup> developed the following measures, which will help educational research institutions to be effective in performing their assigned role of providing sustained long-term support for improving the efficiency of educational systems, in general, and the quality of basic education:

48. Autonomy of educational research institutions must be guaranteed to ensure that researchers have enough freedom to deploy the resources and time, using their discretion to serve the interests of research at best as possible unhampered by the unwanted impediments of cumbersome bureaucracy. Researchers, in order to produce research results timely and useful for decision makers, have to have easy accessibility to necessary resources, freedom of action, flexibility of approach, and above all, the provisional status and privileges at par with those accorded to their colleagues in the universities. Only then a genuine dialogue is possible between the policy makers and the researchers, and the researchers would be able to understand the policy makers' needs for information, direct research efforts to guide policy decisions, and supply needed information timely to the policy makers.
49. Developing effective mechanisms of coordination and cooperation among research institutions within each country. The first step toward achieving this could be the formation of a higher committee charged with the responsibility for prioritization of research needs and coordination of research activities within each country.
50. Providing sufficient incentives to motivate educational leaders and research experts to work in educational research institutions so that the research institutions could include qualified research expertise and highly experienced educationalists.
51. Allocation of sufficient funds for educational research activities. As a measure of sufficiency, some participants proposed that, at least, one to two percent of the budget of the Ministry of Education should be allocated for research. But more important is the flexibility in itemized allocation of funds.

52. Availability of facilities and material equipments needed for educational research. Specialized research facilities such as an adequately stocked research library, documentation equipment supply of research journals and on-line accessibility to information resources are the basic necessities of a research center. More important, however, is the establishment of national and regional databases including data on both quantitative and qualitative variables relevant to educational research. Establishing a database or Education Management Information System (EMIS) naturally entails procurement of the necessary hardware and software, i.e., computers and program packages as well as skilled personnel to operate the system.

### VIII Development of Educational Research in the Field of AE

**A future plan for strengthening the impact of educational research on the development of adult education and of adult basic education, and to improve the contribution of universities and other research centres to such development, should include the following:**

53. Introducing the **philosophy of adult education** in the concept of life-long education as reflected through UNESCO recommendations (Nairobi 1967), (Tokyo 1973), (Paris 1985) and **Adult Basic Education** (Jomtien 1990). This should enable each country to define the objectives of adult education with the scope of learning needs of its people and cultural socio-economic development.
54. Identify **target groups of adults** in different areas and socio-economic environments in order to promote diversified adult education programmes catering for diverse needs of different groups of adults, giving priority to the needs of women and disadvantaged groups of people.
55. Identify all existing **adult education institutions**, which provide all types of non-formal or informal adult education at all levels, from basic to higher continuing education, affiliated to governmental, non-governmental or private bodies. Research in the light of ISCED level and field of study, makes the scientific bases for such identification. UNESCO and its regional office (UNEDBAS) and ALECSO, ISESCO and ABEGS could provide Arab countries with necessary technical help to achieve identifying all required adult education institutions.
56. Defining qualifications and competencies of all **personnel** working in these institutions, and make necessary arrangements to provide suitable training for each category of them. Androgogical approaches should replace the school model, specially among teachers of adults who were trained originally as school teachers.  
Research in the field of effective training methods for adult educators such as **pre-service** and **in-service training** programmes require fundamental changes in universities or faculties of education to play a new role in teachers training. Teacher training institutes, rural development centres, and all similar institutes have to benefit from such research and provide advanced training for animators, group facilitators and local researchers.
57. **Methods and approaches** suitable for adult learners require the exploration of new innovative forms, means and educational structures that transcend formal schooling and include informal education, self-instruction systems and distance education programmes. Researchers in this respect are invited to examine the effectiveness of reading circles, watching clubs, individualized learning approaches. A well designed experimental research, case studies, participatory research and evaluative studies are required.
58. Identifying characteristics of **adult education administrators and managers** including specification of their job description and selection criteria is yet another important area in which research is directly needed. One characteristic of adult education which

distinguishes it from conventional formal education is that it deals with learners of widely different ages in divergent learning environments, and it encompasses a vast variety of social agencies and community institutions. The traditional style of educational administration is no longer viable, there is a need for research to identify the necessary skills, competencies, and characteristics required for administrators of adult education to provide effective administration. The research in this area should be focused also on the issues related to selection procedures, selection criteria, and job description for various administration and management jobs.

59. Development of suitable incentives for adult learners including rewarding **certificates in the labour market**. Such incentives are required to encourage adults to join adult education programmes. Research in this respect should be focused on evaluation means which assess objectively the real benefits of each learning process. This evaluation system should not follow the school examination system, which does not suit adults or adult education. Research should explore evaluation suitable for adults and acceptable to the labour market and for the continuation for non-formal study.
60. One important area of research is **information networking**, which involves the sharing of relevant knowledge, experience, strategies and materials. Meaningful and sustained progress in adult education can be accelerated through the establishment of reliable channels and networks for such exchange among Arab countries, institutions and individuals. It calls for urgent action in the identification of existing networks and their strengthening for increased efficiency of information sharing and dissemination.
  - (a) **At the international level**, UNESCO could provide or strengthen global structures for sharing information and experiences on issues related to adult education.
  - (b) **At the regional level** EIPDAS regional coordinating unit, ALECSO/ARLO documentation and information directorate and ABEGS research center will continue to provide useful sources of information on adult education.
  - (c) **Networking at the national level**, including adult education departments, councils in MOE, ERCs, AE divisions in universities and national AE institutions in concerned ministries and organizations. Information networking should be improved through:
    - identification of existing information networks within the region and assessment of their capacities, activities, target groups and scope with a view to improving their effectiveness in dissemination information concerning AE.
    - setting up when necessary national focal points for information networking on AE
    - establishment of mechanism for sustained cooperation and partnership among existing networks.

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12. Establishment of Educational Management Information Systems.
13. A proposed plan for coordinating and integrating educational research at the national and regional levels.
14. Basic Education and Educational Research in Jordan.
15. Educational Research in the United Arab Emirates: Institutions, positive and negative impact.
16. Educational Research Institutions concerned with EFA in Bahrain, structure, potential and research plans.

17. The Role of Educational Research Institutions in Developing Basic Education in Sudan.
18. Developing of Basic Education through Educational Research Institutions in Syria.
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20. The Role of Research Institutions in Developing Basic Education in Kuwait.
21. Educational Research in the field of Basic Education in Lebanon.
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24. A survey study on Research Institutions concerned with BE in Morocco.
25. The Role of Educational Research Centre in Promoting BE in Yemen.

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## Appendixes

- A. Visits and Data Collected for the preparation of the Paper
- B. Bibliography, Researches on Adult Education in the Arab States
- C. Tables
  1. Educational Researches in the Arab States
  2. Educational Research Institutions in the Arab States

## Appendix (A)

### Visits and Data Collected for Preparation of the Paper

#### I Field Visits:

##### 1. Jordan

The expert is stationed at the UNESCO Regional Office for Education in the Arab States (UNEDBAS) as a consultant for Literacy and Adult Education. He was able to collect all data available in the Office's Documentation Center, which is representing - generally - the educational information network of the Arab States.

In Jordan the following concerned centers were visited:

- National Center for Educational Research and Development (NCERD).
- UNESCO Regional Coordinating Unit of Educational Innovation Programme for Development in the Arab States (EIPDAS).
- Ministry of Education, Department of educational Research and Development.

- Faculty of education, Yarmouk University.
- 2. Syria**
  - Ministry of Culture, Directorate of Literacy.
  - Ministry of Education, Library.
- 3. Egypt**
  - National Center for Educational Research and Development.
  - Regional Center for Adult Education (ASFEC).
  - Academy of Scientific Research and Technology.
- 4. Tunisia**
  - Arab League Educational Cultural and Scientific Organization (ALECSO).
  - Arab Literacy and Adult Education Organization (ARLO).
  - Ministry of Social Affairs, National Literacy Programme.
- 5. Sudan**
  - National Council for Literacy and Adult Education.
  - Ministry of Education, National Training Center for Literacy and Adult Education in Shendi.
  - University of Khartoum, Extra Mural Studies Institute.
- 6. Bahrain**
  - Centre for Educational Research and development.
  - Centre for Information and Documentation, Ministry of Education.

## **II Collection of Data**

As a result of the field visits, personal and postal contracts, most of the available bibliographies, abstracts, and documents on educational research were collected. The most important of which are:

### **Regional Bibliographies and Abstracts**

1. Publications of ASFEC in 25 years, abstracts (Arabic), published by ASFEC Egypt 1978.
2. Education in the Arab World, Dissertations and Thesis (1900)-1984 in French, English and German. Published by Libanicus and Agence de cooperation Culturelle et Technique - 1985.
3. Evaluative Survey Study on Educational and Psychological Researches since 1930s (Arabic), prepared by: Faculty of Education Ein Shams University, Egypt. Published by: Academy of Scientific Research and Technology, 1988.
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### **Regional Seminars**

1. The Regional Seminar on the Role of Educational Research Institutes in Developing Basic Education in the Arab States (Amman, Jordan December 1991) convened by EIPDAS and NCERD.
2. The Regional Study Circle on the Role of Faculties of Education and Educational Research Institutions in Basic Education in the Arab States (Mahrain, May 1993). Convened by ALECSO and Bahrain NATCOM.

The studies and final report of both meetings are collected in Arabic, the final report of the first one was translated into English.

## Appendix (B)

### Bibliography, Research in Adult Education in the Arab States 1949-94

Arab States - General	33
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Palestine	42
Qatar	42
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110. GENERAL DIRECTORATE OF ADULT EDUCATION GDAE)  
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Psychological basis or programmed learning and training: M. Ed. thesis, University of Damascus (SAR) 1969 ARABIC. SYRIA/educational methods: programmed learning/Self learning/(6)
121. YOUNIS, Nasir  
Adult education with special reference to Syrian Arab Republic (SAR) M.Ed. thesis. University of Damascus (SAR) 1970 ARABIC. SYRIA/Adult education: programmes/comparative study/(6)
122. ABU-SARHAN, Alyan  
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124. HASSAN, Zuhdi  
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125. MINISTRY OF CULTURE AND NATIONAL GUIDANCE (MOCNG)  
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129. al-ABBADI Abdel-Rahman  
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Present situation of adult education and learning needs: field survey. MOE, DAE 1992  
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### Appendix C

#### Table 1

#### Educational Research in the Arab States 1900/1994

STATE	1		2		3		4,5 and 6		7		8		30		TOTAL	
	ED	AE	ED	AE	ED	AE	ED	AE	ED	AE	ED	AE	ED	AE	ED	AE
General	144	3	*	3	12	12					-	2			156	20
ALGERIA	89	-													89	-
BAHRAIN	12	-					68	3			25	-	4	5	109	8
EGYPT	276	10	*	13							80	-			356	23
IRAQ	171	7									46	3	4	-	220	10
JORDAN	87	4					1200	9			50	2	34	-	1370	15
KUWAIT	52	1	*	1					*	1	257	6	13	-	322	9
LEBANON	291	1											10	-	301	1
LIBYAN A.J.	37	2													37	2
MAURITAN IA	4	-											1	-	5	-
MOROCCO	61	-													61	-
OMAN	1	-									23	1			24	1
QATAR	5	-							*	1	259	7	3	-	267	8
SAUDI ARABIA	169	5								3	98	2	-	3	267	13
SOMALIA	2	-													2	-
SUDAN	74	5	*	3							5	-	6	-	85	8
SYRIAN A.R.	48	-					84	5							132	6
TUNISIA	75	-											5	2	80	2
U.A.E.	4	-									12	1	-	2	16	3
YEMEN	4	-													4	-
PALEST- INE	26	-									74	1			100	1
	1628	38	3346	20	12	12	1352	17	198	5	929	25	80	12	7545	130

\* Included in the total.



**Table 2**

## Educational Research Institutions in the Arab States

Country		Name of Institution	Affiliation	Date of Establishment
Algeria	1	- National Educational Centre	Min. of National Education	1968
Bahrain	2 3 4	- Bahrain Centre for Studies and Researches (BCSR) - Centre for Educational Research and Development - Information and Documentation Centre	Independent institution Min. of Education Min. of Education	1981 1987 1967
Egypt	5 6 7 8 9	- National Centre for Educational Research and Development - National Institute for Educational Studies and Researches - National Centre for Testing and Evaluation - Curricula and Teaching Material Development Centre - National Council for Education, Scientific Research and Technology	Min. of Education University of Cairo Min. of Education Min. of Education National Specialized Councils	1956 1981 1990 1990 1974
Iraq	10 11	- Centre for Educational Research and Studies - Centre for Educational and Psychological Research	Min. of Education University of Baghdad	1985 1966
Jordan	12 13 14	- National Centre for Educational Research and Development - Dept. of Educational Research - Division for Research, Translation and publishing Development	Higher Council for Science and Technology Min. of Education Min. of Higher Education	1989 1962 1985
Kuwait	15	- Faculty of Education	University of Kuwait	1981
Lebanon	16 17 18	- Educational Research and Development Center - Research Units in the Directorate of Education - NGO Research Centres	Min. of Education Min. of Education NGOs	1971

LibyanAJ	19	- National Centre for Educational Research	General People's Committee for Education	1990
Morocco	20	- National Centre for Coordination and Planning of Technical and Scientific Research	Min. of National Education	
Mauritania	21	- National Educational Centre of Mauritania	Min. of National Education	
Oman	22	- Educational Research Centre - Educational Research Department	University of SGabus Min. of Education	1986 1980
Qatar	24	- Educational Research Centre	University of Qatar	1979
Saudi Arabia	25 26 27	- Directorate of Research and Curricula - Centre for Educational and Psychological Research - Educational Research Centre	Min. of Education University of Um-Al-Kura Abha, Faculty of Education	1976 1977
Sudan	28	- National Centre for Educational Research	Min. of Education	1973
Syria	29 30	- Research and Curricula Development Department - Research Unit	Min. of Education Min. of Culture	1958
UAE	31 32	- Department of Educational Research and Information - Centre for Educational Research and Psychological Services	Min. of Education University of UAE	1980 1987
Yemen	33 34	- Educational Research and Development Centre (Sana'a) - Educational Research Centre (Aden)	Min. of Education Min. of Education	1982 1969

# Adult Education Research Trends in Asia - A Synthesis of Ten Country Studies<sup>1</sup>

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## Background

A ten-country study was commissioned by the UNESCO Institute of Education, Hamburg, on 'Adult Education Research Trends in Asia'. In the selection of the countries, an attempt was made to ensure that the geographical, socio-economic and political diversities that characterize the countries in the region, were adequately represented. Thus, there was the geographical consideration in the selection of Sri Lanka, Bangladesh and India, to represent South Asia; Malaysia, Indonesia, Philippines and Thailand to represent South-East Asia; and Japan, China and Korea to represent the Far East. Likewise care was taken to ensure that countries reflected varying levels of socio-economic development. Thus, at one end, were the developing countries such as Bangladesh and India with their attendant problems of adult illiteracy and comparatively lower achievement levels at primary education, to the rapidly industrializing economies of Malaysia, Thailand, Indonesia with impressive literacy levels and near universal primary enrolment and achievement ratios, to the industrialized economies of Korea and Japan, with their main emphasis on provision of lifelong education. India and China were of interest not only because they were the two most highly populous countries of the world but also because they represented varying political systems.

In each of the ten countries, one researcher was identified and subsequently commissioned to undertake the study on adult education research trends for his/her country. A set of guidelines was sent to each researcher to help in the preparation of the country study. Approximately three months were taken

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<sup>1</sup> A paper submitted to the UNESCO Institute for Education, Hamburg, for a research study titled 'Adult Education Research: World Trend Analysis.'

Views expressed herein are of the author and do not necessarily reflect those of the organization or of the government.

This paper has attempted a synthesis of country studies prepared by the following:

- 1) Maria Luisa Doronila, 'Adult Education Research Trends in the Philippines.'
- 2) Makoto Yamaguchi and Kaoro Okamoto, 'Adult Education Research Trends in Japan.'
- 3) Kim Shinil and Park Sungjung, 'Adult Education Research Trends in Korea.'
- 4) M. Mahbabur Rahman, 'Adult Education Research Trends in Bangladesh.'
- 5) Zainuddin Arif, 'Adult Education Research Trends in Indonesia.'
- 6) W.M.K. Wijetunga, 'Adult Education Research Trends in Sri Lanka.'
- 7) Rahan Tangchuang, 'Adult Education Research Trends in Thailand.'
- 8) Zhan Ruiling, 'Adult Education Research Trends in China.'
- 9) Sulaiman M. Yassin and Maimunah Ismail, 'Adult Education Research Trends in Malaysia.'
- 10) Ila Patel, 'Adult Education Research Trends in India.'

by the researchers in the preparation of the country studies. The purpose of this study was not to describe in detail the research done in adult education in a particular country but to trace the main trends as to the areas, the methodologies used and utilization of research, and to explore future research agendas. The period of reference for the study was the last ten years. Since the methodology used in the preparation of the country study varied, the table below attempts to give an idea of the methodologies used.

Sri Lanka	A questionnaire was sent to leading organizations and their responses obtained and analysed. This was followed by select interviews.
India	Research documents of last ten years were collected and analyzed. Also, quinquennial educational reviews were used.
Bangladesh	Research documents were procured and analyzed.
Philippines	25 organizations were purposively selected to represent four main 'actors' of adult education work viz. government organizations, NGOs, universities, and church organizations. Background information was obtained, followed by interviews.
Malaysia	Besides providing a broad overview, a case study of one university undertaking adult education research, was prepared.
Thailand	Analysis of research undertaken by universities, also of Department of Non Formal Education, NGOs, etc.
Indonesia	Analysis of some research studies.
Korea	Analysis of research undertaken by universities, as well as that of research organizations
Japan	Analysis of research undertaken by government organizations and universities etc.
China	Analysis of research undertaken by government, non-government organizations etc.

In addition to varying methodology, the country studies were uneven in quality and in depth of analysis. An attempt, however, is made in this paper to highlight broad trends that characterize adult education research in the Asian region.

#### **Varying Concept of Adult Education**

Terminology abounds: adult education, continuing education, community education, social education, lifelong education, adult basic education. These terms have been used at one time or another in

most countries of the region, depending upon the changing nature of their development priorities. In countries of South Asia (e.g., Bangladesh and India), where poverty and illiteracy levels are still high, adult education is either perceived narrowly as literacy education or is linked with functional literacy in the overall context of development. As some countries of South-East Asia have overcome the problem of illiteracy and have moved into the next stage of development, the educational systems have opened up so that movement from the in-school to out-of-school education and vice versa, has become possible. The concept of adult education has therefore been enlarged to mean community education and continuing education. In Malaysia and Thailand, adult education is perceived to have a vital role in human resource development. The main thrust of adult education is to develop the human potential and improve the quality of life through continuing education programmes.

Even in China, there is an increasing role adult education is expected to play in national modernization and development programmes. Adult education in China constitutes a significant integral part of the national education system, along with basic (elementary and secondary) education, general education, vocational/technical education and higher education. With rapid economic growth of Japan and Korea in the last decades, the shift to lifelong learning has become inevitable. In Japan, a law was enacted in 1988 to facilitate lifelong learning. A similar act was enacted by Korea in 1982 whereby the state was enjoined to provide lifelong education to the people. In both these countries, the term lifelong education is a comprehensive and all-encompassing one.

As is apparent, adult education has grown phenomenally in the region. With its growth, it has become more and more apparent that adult education requires substantial and systematic inquiry.

### **Status of Adult Education Research**

While there is a gradual enlarging of the concept of adult education and a growing realization of the importance of adult education research among national governments, the status of adult education research has remained marginal and perfunctory. This is because in the field of education, it is formal education that has continued to enjoy a higher status and prestige. Consequently, research in education has tended to focus principally on school, college and university education. There is an overall lack of commitment in promoting adult education research.

Adult education research has also lagged behind because of a rather hazy concept of adult education itself. Is adult education only a field of social practice or is it also a field of study? Those who believe it is only a field of practice, are unable to perceive that adult education can develop as a field of scholarly inquiry, borrowing from various disciplines. In fact, one common characteristic among adult educators seems to be a negative attitude towards adult education research. The view is that research carried out is of little, if any, use to those concerned with implementing adult education programmes. On the other hand, due to the stress on practicability, research in the field of adult education has tended to be practice-oriented. This has happened in the case of Korea, where most of the research undertaken has tended to be practice-oriented. In China and Japan, and to some extent Philippines, research studies have been promoted by the central or national government in order to help in subsequent policy making and programme planning. But in Bangladesh and Sri Lanka, even a research orientation to the field of adult education is missing. In India, Philippines and Thailand, the research studies that are government-sponsored, are mainly in the nature of evaluation of on-going adult education programmes.

Overall, it appears that adult education research not only has a marginal status in most of the countries of the region, it is also characterized by lack of clarity about its importance, ad hocism, and lack of direction and focus.

### **Organization and Management of Adult Education**

Research in adult education, though comparatively fledgling in size and scope, is carried out in divergent settings such as government agencies, universities and research organizations, and NGOs.

**Government organizations and agencies** - By and large, it is the Ministry of Education at the national level, or a subordinate unit or a bureau under it in charge of adult education, that promotes and funds adult education research. In some countries, committees or councils have been set up to promote adult education research. Thus, in the Philippines, a Literacy Coordinating Council (LCC), an inter-agency body attached to the Department of Education, was created in 1991 in order to boost research and development work in literacy implemented by government and NGOs. LCC commissioned three research studies to help in the planning of literacy programmes of Department of Education. Legislation intended to establish the Philippines Centre for Non-Formal Education was introduced in the 1992 Congress but is still pending legislative action. Among other functions, the Center is intended to promote and facilitate adult education research and development work. In Japan, Ministry of Education, Science and Culture, has various bureaus of which Lifelong Learning Bureau is one. National Institute of Educational Research is attached to the Ministry and has a responsibility to undertake research studies in order to assist the Ministry in policy-making. In addition, research studies are carried out at the prefectural and municipal levels and the number of such studies has been steadily increasing. In Korea, Committee of Lifelong Education in the Ministry of Education, carried out some policy studies but there is no organizational structure in the government for promoting adult education research. This is true of Bangladesh too. In Sri Lanka, the National Institute of Education, under the Ministry of Education, has the responsibility for undertaking educational research, including adult education research, but has limited research capability for doing so. In Indonesia, in the Ministry of Education and Culture, there is a unit for educational research which has the responsibility for coordinating and implementing all educational research activity, including research for out-of-school and adult education. The Non Formal Education department within Education Ministry in Thailand has been undertaking action research and research for development in recent years. In China, the central mechanism is the National Steering Committee on Educational Research Programming, chaired by an ex-Minister of Education and located in the National Institute of Education. This Committee coordinates and reviews study projects in all fields of education, including adult education. Ministry of Finance allocates block grants to the Committee and the latter defines priority research areas and provides financial support for research activities. For the implementation of government-sponsored adult education research, there has developed a national network of research institutes, centers, or offices at the national and local levels. In Malaysia, R and D activities are coordinated in terms of planning, monitoring and budgeting by a Central Council called 'National Council of Research and Science Development'. Adult education research is promoted through a new mechanism called IRPA (Intensification of Research in Priority Areas). IRPA involves all institutes of higher learning, research organizations and central agencies of the government. In India, the Ministry of Human Resource Development set up the National Institute of Adult Education in 1991 as an autonomous institute for providing academic, technical and research support in the field of adult education. But due to low priority accorded to research in adult education, it remains to be seen whether the government would contribute to institution-building for developing critical knowledge in the field of adult education and upgrading the marginal status of adult education research in India.

**Universities and research organizations** - Adult education research promoted by the universities is mainly of the following variety (i) basic and policy-oriented research related to areas of academic specialization; (ii) graduate theses and dissertations; (iii) commissioned evaluation studies of on-going adult education and/or development programmes. In addition, in some countries there are research institutes or centres within or outside universities that undertake research in specific areas of specialization. UP-Education Research Program attached to the University of the Philippines, is an example of a university-level multidisciplinary research centre which was set up in 1991 in order to promote educational research or the University Centre for Women's Studies with a special focus on women's issues. However, for want of a research clearinghouse- except for commissioned policy and evaluation studies, university research remains largely unsystematized and unutilized. Doronila refers to a recent effort at compiling a general annotated bibliography of Philippines educational research covering the period from 1975-1991. From this bibliography it is apparent that research on adult education has the smallest number of entries.

While some universities in Bangladesh and Sri Lanka have departments of education, they do not yet have separate departments of adult education. In the other countries, there are universities that have separate departments of adult education and adult education research is promoted either through these departments or through departments of education or other disciplines of social sciences. But the volume of university research in the field of adult education is miniscule and inconsequential in nature. According to Yamaguchi and Okamoto, during 1983-1992, there were only 19 Ph.D. theses in adult education in Japan. This was a mere 7.1 per cent of the total number of Ph.D. theses in the field of education. Despite the inter-disciplinary nature of adult education, in comparison with other disciplines of social sciences, adult education research was very small in number. In India, the introduction of the National Adult Education Programme in 1978 and consequent expansion of large-scale programme of adult education led to the expansion of departments/units of adult education in the universities. However, the primary focus of these departments remained on extension work and not on research and teaching. Given the low priority to research in adult education departments, they neither succeeded in building institutional infrastructure for research nor elevated the status of adult education research as an important field of inquiry. On the other hand, several institutes of social sciences and management have been engaged in government-sponsored studies that have mainly consisted of evaluation research in adult education. Patel refers to the quinquennial surveys of educational research in Indian universities and research institutes. These surveys showed that during 1941-88, only 1.1 per cent of Ph.D. theses and 2.2 per cent of research projects had focussed on adult education.

In Thailand, on the other hand, there are some universities that have been offering a Master's degree programme in adult education since the 70s. Tangchung's study showed that there were 438 research studies that were undertaken during the last ten years, of which 65% had been produced in the universities. In Korea, despite a number of research institutes of adult education that have been set up in some universities, adult education research has languished for want of financial support and dearth of professional researchers.

In China, in addition to the 'Big Five' Universities, there are various university-based research centres, autonomous research institutes that are involved in adult education work. Colleges of adult education and institutes of adult education research have been set up to conduct both teaching and research programmes. Research institutes outside the educational sector also deal with and contribute to adult education research.

**Non-Government Organizations (NGOs)** - Research is not a priority concern for most NGOs working in the field of adult education. And yet there are national level associations or societies that promote the cause of adult education and undertake periodic research work. In Japan, the Japan Society for the Study of Adult Education promotes individual and joint research studies. In Korea, the Korean Society for Adult Education and Korean Association of Adult Education have broad research interests. In addition, Korean Society for Literacy and Adult Basic Education and Korean Association for Community Education and Korean Society for Industrial Education also promote research by individual scholars. But there is little financial support for adult education research. Also, due to the absence of a central mechanism for coordinating and reviewing adult education research, utilization of research is limited as the research findings are not even disseminated. In Bangladesh, the Foundation for Research on Educational Planning and Development (FREPD) has conducted a number of exploratory and evaluation studies. In China, the leading organization is the Chinese Association of Adult Education which is one of the four major associations of education and under which there are affiliated societies of adult education research. In India, the Indian Adult Education Association, Literacy House, Bengal Social Service League have undertaken some research studies to improve the practice of adult education.

In addition to the national level NGOs working directly in the field of adult education, most countries have a large number of NGOS whose work in the field of adult education is varied and sometimes, is even more dynamic. There are various types of grassroots-level NGOs whose work impinges on adult education either directly or indirectly. Thus there are NGOs that are funded by the government and participate actively in the implementation of adult education projects of the government. Then there

are those NGOs that are supported by government and/or international agencies but undertake adult education as part of development work. The major thrust of such NGOs is to improve the economic conditions of the poor. Then there are those whose work differs substantially from that of the government and whose major thrust is on consciousness-raising for socio-political struggle in order to change the existing social structures. Freirean in their orientation and approach, their emphasis on process and participation constitute a significant and welcome departure from the 'banking concept' of education that characterizes the government-sponsored programmes of adult education. NGOs of the transformational type, however, have to rely mainly on foreign funding for their support. While research is not the priority concern of most of the NGOs, the fact remains that some interesting documentation in the form of case studies and small research studies to ascertain the learning needs of local communities or impact of a development programme, have shown some innovative NGO approaches to adult education. But such documentation is presently weak and difficult to access.

From the above, it is apparent that adult education research has grown in recent years and is undertaken in divergent settings. There is thus, a growing trend towards institutionalization of adult education research. On the other hand, in most countries, there is an absence of a national level organization to coordinate adult education research undertaken by various institutes, organizations, universities, and NGOs. Nor is there institutionalized financial support on a sustained basis for adult education research. Wherever National Institutes of Education have been set up with the expectation that adult education research would also be taken up, this has not necessarily happened. For adult education research has invariably been sidelined and marginalized in such Institutes because of the importance attached to formal education. Clearly, in order to promote adult education research, there is a need for an institutional structure that would promote, encourage, sponsor research in adult education. There is also a need for an organization that would coordinate and review adult education research. Wijetunga spells out some of the functions of such an organization thus:

- prioritizing areas for adult education research on the basis of national goals and policies;
- providing opportunities for human resource development and creating a network of institutions engaged in adult education research;
- advocating relevance and importance of practical applications of adult education research;
- intervening at policy level, on the basis of research studies;
- disseminating adult education research findings, and promoting/supporting publications in adult education research.

To what extent should such an institution be government-controlled or have a subordinate status to the Ministry of Education? The case of the National Institute of Educational Research (NIER) from Japan and that of the National Institute of Adult Education (NIAE) from India throws some light on the organizational problems of institutes that have been set up by the central governments. In the case of NIER, as in the case of NIAE, the mismatch between the expectations of the bureaucracy and that of the adult education professionals has proved to be detrimental to the cause of adult education research. This experience might provide important pointers about the nature of such an institution, the kind of funding it should receive, and its relationship with the government. Since Philippines and Bangladesh are likely to set up such institutes in the near future, they could possibly benefit from this experience.

### **Trends in Adult Education Research**

Despite the comparatively small body of knowledge in the field of adult education, it is still possible to discern some broad trends in adult education research. Thus, there are some countries in the region (for example, Bangladesh and Sri Lanka) where even the culture of adult education research has not been established. Even when interest in adult education research is evinced by some researchers, only a few of them engage in such research actively. Elsewhere, it appears there has been a steady growth of adult education research in the last ten to fifteen years. But the areas of research are limited. In any case, some broad characteristics that typify adult education research are the following:

- 1) Most adult education research is programmatic research. Since adult education is perceived largely as a field of practice, focus of most research has remained primarily on



understanding practical issues in the implementation of adult education programmes. According to Shinil and Sungjung, their analysis of 230 theses that were completed during 1980-1993 in Korea showed that a large number of the studies related to situational analysis, needs analysis, policies, and institutional systems of adult education. Most of the research was practice-oriented. In Japan, the main areas for research included learning needs and interests of various target groups, learning activities, learning conditions, and leisure activities for adults, particularly for the aged. Patel's quick thematic analysis of the abstracts of the 36 Ph.D. theses undertaken in Indian universities during 1978-88 revealed that the primary focus of research was on the study of specific operational aspects of the ongoing adult education programmes rather than on building knowledge in foundation areas of adult education. In Thailand, research is linked to practice and there is an attempt by the Department of Non Formal Education to liaise with the universities so that research would help to improve practice. In China, it is practice-oriented research which is emphasized as a result of which applied research is considered to be important in adult education research.

- 2) Evaluation research of on-going programmes of adult education also tends to dominate in adult education research. Doronila's analysis showed that the main areas of research included evaluation and impact studies of various government programmes in the Philippines. A large number of such studies were commissioned studies by the government or the funding agencies - bilateral or international. Even in Bangladesh, evaluation of on-going adult education programmes are periodically undertaken. In India, the government commissioned about 88 evaluation studies during 1978-92 to various research institutes and agencies in order to understand the process and problems of implementing adult education programmes and to ascertain their impact on the learners. Although evaluation studies are presented as programme evaluation, the focus of such research is on assessment of programme implementation in terms of inputs and outputs without reference to the transformative processes and the context that influence programme implementation. According to Patel, unqualified claims of success or failure of a programme, based on such 'black box' type of evaluation, has not assisted policy planners to improve programme implementation or helped in formulating appropriate policy in adult education.
- 3) Due to the practical orientation of adult education research, a large number of research studies do not appear to have been derived from a theoretical framework or even a theory-based conceptualization of the problem. Shinil and Sungjung note the neglect of such an orientation in adult education research in Korea. Doronila also makes the same observation about educational research in the Philippines. Patel's observation about evaluation research could well be extended to most research in adult education in India. For developing an appropriate conceptual framework is a neglected area for most research studies in adult education. As a result, most research is undertaken as a largely atheoretical activity.
- 4) In terms of research methodology, it is quantitative methodology in the form of surveys, that is largely used in most countries of the region. At times, however, there are attempts to combine quantitative and qualitative research methods. Patel notes the lack of sophistication in the use of quantitative data. According to her, despite large scale collection of quantitative data, most studies in India do not even systematically use descriptive statistics. Data analysis is thus generally restricted to rather simple presentation of data in terms of raw frequencies and/or percentages. Doronila also notes that while the preferred methodology appears to be the one-shot survey with quantitative analysis used very often, it is only in a few cases that there is evidence of attempts to develop designs with greater explanatory and predictive value. With regard to qualitative research methodologies, case studies are frequently used but there is little evidence of use of participant observation or in-depth interviewing or of ethnographic work. Despite the

fact that participatory research had its origin in adult education related work, there is by and large, no evidence of the use of participatory research and very little, of action research, barring in the work of some NGOs.

- 5) Adult education is an interdisciplinary field of study, and yet most adult education research has not attempted to develop a specialized body of knowledge to build adult education as an important field of inquiry within social sciences. Research studies in adult education are largely undertaken by social scientists and yet adult education is seldom studied from the perspective of social sciences. In 1989, the Korean Society for the Study of Adult Education discussed the need and the possibility of multi-disciplinary approaches for the study of adult education. This was the first attempt to consider development of adult education as part of social sciences. Yamaguchi and Okamoto's analysis revealed the marginal status of adult education within social sciences in Japan. According to Patel, even a cursory look at adult education research conducted through Indian universities and research institutes revealed that most research in the field of adult education was dominated by positivistic, behaviouristic and ahistorical research tradition. She is of the opinion that certain foundational areas of adult education research, such as history of adult education, sociology of adult education, politics of adult education, and language issues in adult education, have been neglected. It is therefore essential to broaden the conceptual approach to adult education and situate it within a larger societal context. Unless this happens, adult education research will continue to have a marginal status in social sciences.
- 6) A great deal of adult education research which is university based research in the form of theses, suffers from constraints of time and of financial resources. Due to the absence of a clear research agenda, most of these studies are narrow in scope and in depth of analysis. A difficulty with such studies is that there is little possibility of synthesizing several studies to allow for second-order abstractions. On the other hand, there is no attempt at collaborative research in order to widen the scope of research and to increase generalizability of results. Doronila notes this as one of the characteristics of educational research in the Philippines. Such a situation is probably characteristic of other countries in the region as well.
- 7) Women have always constituted an important clientele group, whether of the basic literacy or of the continuing education programmes. And yet adult education research has not always been sensitive to gender issues. In some countries of the region, however, women's issues have received attention as part of national commitment and global effort towards advancement of women's cause. Thus for example, in Japan and in Korea, women's education is one of the major areas in adult education research. Considerable amount of research, however, relates to needs assessment studies. In Japan, such studies are used for preparing a plan of action at the prefectural and municipal levels. In China, studies on gender issues in adult education have been on the increase in recent years. Research themes on gender are diversified and special research institutes and centres have been established to engage exclusively on gender-related research in adult education. Elsewhere, in other countries, it appears that while there is a tendency to treat gender issues as important, there is very little reflection of the importance attached to gender in the research studies that are undertaken in adult education. Patel notes that researchers in adult education have neither paid adequate attention to examining gender issues in adult education nor have undertaken systematic research on adult education for women. Wijetunga observes that in the case of NGOs that work only with women, their priority concern is not adult education research. Even in the case of institutions engaged primarily in women's studies, despite research being one of the important areas of concern, gender issues in adult education is still not part of their research agenda.

### **Dissemination and Utilization of Adult Education Research**

Research in adult education would be meaningful only if it would lend itself to dissemination and practical application. Lack of dissemination of research findings would impose certain debilitating constraints on research itself. Thus for example, unpublished research would remain unchallenged research. Also, any useful application of such research would be ruled out, so also an opportunity to influence policy. In Bangladesh and Sri Lanka, dissemination of adult education research is limited. In Bangladesh and India, evaluation studies normally only serve the purpose of the funding organization and are mostly available in mimeographed form, and not as printed publications. In Sri Lanka, a large majority of dissertations and theses remain inaccessible. In Thailand, universities disseminate abstracts of theses by reprinting them in the 'Yearly Theses Abstract.' Some of the findings of research studies are published in newsletters and journals and sometimes, in the newspapers. The research studies undertaken by the Non Formal Education Department are published after 5 years and occasionally conferences and seminars are organized on utilization of adult education research findings.

Some of the usual avenues for dissemination of adult education research findings in most other countries include the following: i) publications such as books, professional journals and newsletters; ii) symposia and forums where papers are read and publications are made available; iii) occasional research conferences for researchers, planners and professionals iv) newspaper articles for general public.

In India, abstracts of some of the Ph.D. theses in adult education, as well as of the studies conducted by research organizations have been disseminated through four volumes of the quinquennial Survey of Educational Research published by the National Council of Educational Research and Training. In the Philippines, a recent effort was made by the Philippine Association of Graduate Education, in collaboration with the Department of Education, to compile a general annotated bibliography of Philippine educational research covering the period 1975-91.

In recent years, the research community in China has stressed the necessity and significance of improving utilization of adult education research findings. For there is a realization among adult educators that research will be meaningful only when its findings are disseminated and utilized either for influencing policy, improving practice, or assisting in theory-building. Policy makers, planners, administrators and practitioners are thus major utilizers of adult education research findings in China.

Barring this, however, the overall experience in all other countries seems to indicate that adult education research is disseminated through various channels but in a sporadic and uncoordinated manner. Sustained and concerted efforts are therefore needed to bring the existing adult education research into the public domain and to use the findings to influence policy and to improve the implementation of adult education programmes. Clearly, there is a need for a coordinating agency that would systematically compile and critically review existing research and on that basis, identify priority areas for future research. Likewise, the innovative work in adult education undertaken by NGOs is presently inaccessible and would need systematic documentation - both in printed and in audio-visual medium - for wider dissemination.

### **Future Directions in Adult Education Research**

Interest in adult education research is a comparatively recent phenomenon in the region. While adult education per se still has a marginal status in a few countries, in most others, adult education is now increasingly being regarded as an integral part of the education sector. Concepts such as lifelong education, recurrent education, learning society and the like, have created a new role for adult education in some of these countries, generating an interest and a demand for research. But the response to the demand for research has varied between countries depending upon government policies and the institutional context of research. While at one end there are countries where the institutional support for adult education research is still weak, there appears to be a growing trend towards institutionalization of adult education research. As a result, adult education research is undertaken in divergent institutional settings such as government organizations, research organizations, universities, NGOs etc. There is, however, a lack of financial support for undertaking research on a sustained basis. As a result, research activities that are undertaken are sporadic and ad hoc in nature. Committed and sustained financial support would be crucial if adult education research has to be promoted. Presently, government appears to be the main source of funding

for adult education research. Since government funding can be erratic, can define research agendas narrowly, and discourage any critical research, it would be imperative that alternative funding sources are explored in the future.

Adult education research has tended to be practice-oriented. As a result, theory-building in adult education has been neglected. Also, adult education is an interdisciplinary field of study and yet divergent perspectives of social sciences have seldom been reflected in adult education research. While practice-oriented research aimed at solving field problems is not unimportant or unnecessary, the problem is a lack of balance between practice-oriented and discipline-oriented research. Also, lack of interdisciplinary orientation has tended to make practice-oriented research almost atheoretical. Thus problems that face adult education research relate to the imbalance between practice- and discipline- oriented research and to the atheoretical approach of most practice-oriented research. It would therefore be imperative that adult education researchers take up the challenge of theory-building in adult education. This could be done by developing a unique body of knowledge suited to its purpose through two methods (i) formulating principles or generalizations on the basis of practice and (ii) borrowing knowledge which has been developed in other fields of study and reformulating it for use in adult education.

Adult education research has suffered due to a lack of methodological sophistication. There has been a tendency to rely heavily on the traditional quantitative methodology without necessarily ensuring the methodological rigour that accompanies its use. While there is evidence of the use of qualitative methodologies as well, there is still scope for using more innovative research methodologies in adult education. The experience of some NGOs in the use of participatory research and action research would be particularly relevant. Furthermore, while there has been a tendency to use the research methodologies developed in the West, it would be worthwhile now to explore indigenous methodologies that would be more appropriate in varying cultural contexts. Since women constitute a major clientele group of adult education programmes, it would be challenging to evolve appropriate research methodologies for undertaking adult education research with Asian women.

Professional training of researchers in adult education is crucial in order to improve the quality of research. Presently, it is largely the universities that train researchers through the Master's and Ph. D. programmes. Given the uneven quality of training given to adult education researchers, it would be necessary to augment this training through short term and long term academic courses. National level organizations could play an important role in organizing such courses in order to upgrade the knowledge of adult education researchers, as well as of the academic staff in universities and in research organizations. Likewise, in order to link research to practice, special courses could be developed to 'demystify' research so that adult education practitioners could use simple research methods and tools for improving the practice of adult education.

Adult education research has tended to be arbitrary and ad hoc, sometimes with little relevance either to theory-building or to improving its practice. In fact, empirical findings generated from various individual studies remain isolated observations since they are not built on common theoretical approaches or methodology. It would therefore be useful to first define a research agenda, identifying key areas for research. Collaborative research studies with the help of interdisciplinary research teams, could then be promoted on the basis of a common conceptual framework and design. The advantage of undertaking collaborative research studies would be that they would then, in all probability, not only improve the quality of research but would also contribute to theory-building for improving the practice of adult education. Networking would be crucial for exchanging information and experience whereby joint research efforts would be made possible. Cross-cultural comparative studies would be essential to improve the quality of adult education research in the long run. UNESCO Institute of Education could continue to play an important role in promoting such cross-cultural studies.

Proper dissemination of research findings is crucial in order to improve the practice of adult education research. Presently, research findings are neither documented systematically nor disseminated effectively among researchers, practitioners, and policy makers and planners. Systematic documentation and dissemination of adult education research findings to various 'clients' of adult education would have to be undertaken through varied modes of dissemination. Besides regular professional interactions, channels

of communication would have to be established among researchers, planners, administrators, and practitioners in order to make research relevant for formulating adult education policy and for affecting adult education practice.

Finally, in order to promote adult education research, there is a need, at least initially, to set up an institute/centre that would energize, catalyze, and coordinate adult education research. Such an institute could play an important role in providing academic leadership to various institutes and agencies involved in adult education research. A genuinely autonomous stature of such an institute would have to be guaranteed in order to ensure that it can promote high quality research for building knowledge base in adult education, as also for making research relevant and useful by bringing it closer to the field realities of adult education. This might well constitute the first step if countries in the Asian region are serious about promoting adult education research.

## Agenda for Adult Education Research - the South Asian Perspective

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### Introduction

Education of adults is rooted in the history and culture of Asian people. Religious scriptures and teachings of sages place high value on learning. Lifelong education, mainly through oral communication, is a living tradition in this region. Learning is often a part of religious observance and institutional fora are, generally speaking, indistinguishable from places of worship. These include *madrassah* in the Arab countries; *idaras* and *maqtabas* in Iran and central Asia; *dargahs*, *tols*, *pathshalas*, etc in the south Asian sub-continent and *mutts* and *viharas* in south-eastern Asia. There is a kind of timelessness about these institutions, depending for their effectiveness on the reverence inspired by the *mullah*, *imam*, *guru*, monk, etc, rather than on the content and methods used.

The nineteenth century was a period of grave disturbance. As a result of design of the colonial powers - the British, the French and the Dutch - an attempt was made to uproot the traditional system of learning, and to replace it by state-sponsored institutions, generally using as medium of instruction a language which was foreign to the people. Educational decisions were made by officials - sometimes on their own volition, sometimes on the recommendations of committees of persons hand-picked by them. Educational research received little attention in the universities, and it had little value for decision makers. Although country after country rose from the dominance of western powers, scarcely any one of them brought into force fundamental reform in education.<sup>2</sup> Much of social science research in this region is imitative and has had hardly any impact on social analysis or policy. After decades of political change, there are few universities, or other noteworthy institutions, which have established credible centres of educational research.

There has been a pressure in practically all Asian countries for expansion of university and secondary education. Primary education, too, has received attention - being an indispensable aspect of the policy which makes a claim of commitment to equity. Adult education, however, came late on the agenda of educational planning and there are hardly any examples of countries achieving a substantial improvement in the rate of literacy or level of basic education as a result of adult education programmes. In most countries of south Asia - from Iran to Burma - adult education waves came and subsided, leaving little impact on the educational or developmental scene. Little wonder that there has been hardly any research in adult education, and much of what has been is government sponsored and it has been of little consequence for the manner in which decisions are made or programmes conducted.

### India's Indeterminate Experience

Adult education activity was sporadic and desultory during the British period, and right upto the mid-sixties. Reliance was placed mainly on nongovernment organizations and on voluntary work of individuals. Then onwards, i.e. after the mid-sixties, it was the will of political leaders and some persons in bureaucracy which determined the course of adult education programmes. A far-sighted senior civil servant in Agriculture Ministry of the federal government started Farmers Functional Literacy Projects in 1966-67 - a joint venture comprising functional literacy, farm broadcast and farmers' training in the use of high-yielding varieties of seeds. This project was short-lived and was succeeded, after five years, by

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There are some exceptions to this statement, for example Viet Nam.

another well-planned programme - Nonformal Education for Youth in 15-25 Age Group - this time on the initiative of a UNESCO advisor. This programme, too, got phased out within about three years of its commencement.

### **National Adult Education Programme (NAEP)**

As a result of Indira Gandhi's defeat at the hustings, Morarji Desai became India's prime minister in 1977. Among the numerous commitments he made to the people there were two which he used to flare with much sincerity: prohibition and literacy.<sup>3</sup> NAEP was launched in 1978 and a National Adult Education Board, headed by the Prime Minister, was set up to steer a movement for eradication of illiteracy. The Board issued an eloquent policy statement and the federal government committed 10 percent of all educational expenditure for adult education. NAEP extended to the whole country - involving over 1000 NGOs and setting up nearly 200,000 adult education centres with an elaborate machinery at all levels for supervision and management of the Programme. There was little researched material to base decisions on, nor the time and patience to test and research into postulates which comprised the Programme. A couple of specific issues will illustrate the point.

**1. The course duration:** Prior to NAEP in practically all programmes of large size, it used to be assumed that if adults attended classes over a period of time, say for one year, they will receive education which will bring about a change in their way of life. Hardly any effort was made to define the competencies which should be achieved in a literacy course - either with reference to the curriculum of primary education or otherwise. One of the few programmes in which an attempt was made to assess the number of hours that are required for imparting literacy was Functional Literacy of Adult Women, which was a component of the Integrated Child Development Services (ICDS) Programme. However, these attempts to lay down the duration of literacy courses were inconclusive. When this subject came up for consideration in one of the first meetings of National Board of Adult Education it was emphasised that instructional activity undertaken under NAEP should emphasise "functionality" and awareness building alongside literacy. As regards the duration of course, a few members who had organised literacy activities attempted to recall their experiences. Some members talked of months, others of hours. Finally, a decision was made to run courses of a duration of 300 hours, it being expected that it may take about 10 months to run such a course. It was mentioned that the level of literacy should be such that it enables the learner to continue her/his education in a self-reliant manner. But what that level might be was not spelt out in terms of competencies. As a post-script it may be added that the committee set up by the Government of India in 1980 to review NAEP recommended that the duration of the literacy course should be doubled.

**2. Post-literacy:** The Education Commission (1964-66) had emphasised the importance of post-literacy and continuing education programmes and had observed that necessary planning for such programmes should take place side by side with the planning of basic literacy programmes. Apart from the recommendations of the Education Commission, people responsible for NAEP recalled that a large literacy campaign started in Maharashtra had borne little result mainly due to neglect of post-literacy activities. Consciousness about the importance of post-literacy was not lacking, and a special mention about it was also made in an NAEP policy statement. Effort was made to learn from the experience of Kerala where a large rural library movement was successfully run, as also from other smaller attempts. However, no systematic programmes were taken up for persons who had completed the literacy course. After about one year of the start of NAEP a committee was set up to make recommendations on this subject under the chairmanship of J.P. Naik, an eminent educationist. In a somewhat hurriedly prepared report the committee

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Recalling Mahatma Gandhi's statement, Desai used to say: "Illiteracy is India's sin and shame, and must be eradicated." In the first meeting of the National Board of Adult Education he said: "I would treat my prime ministership as having fulfilled its mission if India adopted prohibition and illiteracy was eradicated."

recommended six models for post-literacy for NAEP. The committee had no access to researched conclusions either in respect of India or any other country with similar background. The report of the Naik Committee did not even get known to most people responsible for implementation of NAEP and, in reality, the post-literacy component of the programme failed to materialise.

**3. Evaluation and research in NAEP:** An attempt was made from the beginning to take the help of institutions of management and of social science research in order to have concurrent evaluation done of NAEP activities in the field. Eleven such institutions, all with high reputation for academic excellence, were involved and as many as 56 studies were published by them during the five years of the life of NAEP. Practically all the studies were quantitative, although some of these institutes did take up some interesting studies of the training systems and efficacy of instructional materials. It was also envisaged that the evaluation studies would be jointly considered by the central and state management structure of NAEP, as well as the research agency. Such inter-actions were, however, an exception and little was learnt from the evaluation and research studies. It is also remarkable that although a couple of university departments of education were assigned this responsibility, they did a rather superficial job and the university system remained isolated from NAEP.

### **National Literacy Mission (NLM)**

After entering offices as prime minister in 1985, one of the first declarations made by Rajiv Gandhi was about a new education policy. In order to meet the Prime Minister's expectations the National Policy on Education 1986 (NPE) was formulated in record time. The Policy expressed strong support for literacy and adult education. Envisaging to a framework of lifelong learning, NPE called upon federal and state governments, and the people of India, to take determined steps for the eradication of illiteracy. Simultaneously, Rajiv Gandhi launched a number of "Technology Missions"<sup>4</sup>, intended to secure for the well-being of the masses the benefits of modern science and technology. These were called "mission" to signify a sense of urgency and timeboundness, the need for all persons concerned to work in a spirit of service, and to justify induction of a new kind of management - which was professional, efficient and dedicated. Literacy was viewed as a "technology mission" from the beginning although it was accepted that there would be hardly any contribution of science and technology. The National Literacy Mission was launched in 1988 and although there have been four changes of government at the national level, government's commitment to NLM remains undiminished. An independent and empowered Mission Authority was created with the launching of NLM and at the end of June 1994, NLM was being implemented in 180 out of the country's 480 districts. The past experience had shown that, to the extent possible, the programme postulate needed to be validated through a process of research and that ad hoc decisions could cost the nation dearly. Nonetheless, several important decisions were made on the basis of informal advice, general inferences from experience, intuition, or sheer expediency. We would refer, once again, to a few areas to exemplify how neglect of research proved hazardous to the progress of NLM.

**1. The graded curriculum:** True to the spirit of management in the mission mode, one of the first questions faced by NLM pertained to specification of learning outcomes. NAEP and other earlier programmes had made certain assumptions, but no satisfactory research was available about their validity. Planners of a large literacy campaign were once again faced with a knotty situation. A decision was taken that it should be made possible to impart a course of 200 hours in 5½ to 6 months, thereby running two courses every year although only one was run in NAEP. The Executive Committee of NLM Authority introduced the concept of Improved Pace & Content of Learning (IPCL). IPCL acknowledged that the duration of the literacy course would be about 24 weeks. With uncommon ingenuity, it spelt out three parameters of IPCL: (a) A three graded course, with clearly spelt out skills in Arithmetic and Language at the end of each grade. The course was divided into nine units for periodic testing of the learners. (b)

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These included missions for Telecom, Oilseeds, Drinking Water and Immunization.



Enhancement of motivation of learners and instructors - this was intended to be achieved through mobilisation techniques and invoking in them a sense of patriotism. (c) Improvement in teaching/learning materials, training and the system of supervision. The Executive Committee claimed that a reasonable level of literacy could be achieved by the employment of these multi-faceted inputs envisaged in the IPCL method. NLM has been under implementation for over five years<sup>5</sup> but even now there are no research findings about the validity and impact of IPCL. Meanwhile, millions of illiterate people have attended literacy classes - passing one or more of the three grades. Neither they nor the planners know whether these literacy skills will bring about a long-term change in their lives.

**2. Post-literacy in NLM:** There is a serious lack of clarity all around on this subject. The National Policy on Education 1986 recommended institutionalized post-literacy activity. People's Continuing Education Centres (*Jana Shikshan Nilayams*), it said, should be set up with government funds. NPE also suggested a variety of courses for continuing education and skill training. However, in NLM the emphasis has been on urgency to achieve the goal of eradication of illiteracy and on creation of a system which would maintain the literacy skills. There is also an internal pressure within NLM to keep the costs of post-literacy as low as possible. A mention is, therefore, often made that the teachers, and supervisors should do their work free of charge. And although consciousness about the need for satisfactory post-literacy facilities is not lacking in official quarters, the "post-literacy campaigns", as they are called, are remarkable only for the shoddy manner in which they have been planned and the cavalier manner in which they treat men and women who have completed some stage of the literacy course. As a result, the districts which are said to have achieved total literacy, have little understanding regarding the manner in which post-literacy programmes may be influenced. Even more unfortunate is the fact that practically no studies have been undertaken of the percentage of newly literate population which relapses to illiteracy, or for that matter, the manner in which the literacy programme has influenced the way of thinking, and the life style of the literates.

**3. Research and evaluation:** NLM is implemented in selected districts.<sup>6</sup> The autonomous society which is set up for implementation in a district attempts to conclude its work - i.e. make practically all persons literate in a specified age group, say 15-35 or 15-40, literate in the shortest possible time. Once the district literacy society feels it has completed its task, it asks the NLM Authority at the federal level to have its performance appraised. Evaluation in NLM has consisted mainly of the number and percentage of illiterate persons made literate with reference to achievement of grades corresponding to the three grades laid down under NLM. There was considerable thoroughness in evaluation at the initial stages of NLM - but the rigour of evaluation declined as the programme progressed, and there were pressures to show good and quick results. Evaluation work in NLM, from the very beginning, was not assigned to institutions, but ad hoc teams were created for each district. Further, evaluation has all along been at the conclusion of a district campaign and it has been utilised mainly to declare, or not declare, the district literate. Consequently, rather than contributing to an improvement of the programme, evaluation has tended to push the programmes towards a quantitative orientation to a neglect of the qualitative aspect. Evaluation in NLM has also contributed little to an enquiry or study of processes which contribute to adult learning, or to organised scientific investigation to solve problems, test hypotheses, etc. Research, indeed, has taken a back seat in the drive to cover more and more districts. Even universities, including their departments of extension and adult education, have joined the bandwagon of literacy workers overlooking their role and responsibility in the area of research.

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<sup>5</sup> Paper prepared in July 1994.

<sup>6</sup> A district is an administrative unit in India and on an average comprises a population of 1.5 million.

### Summary and general conclusions

We have cited these Indian experiences not only because the author is better familiar with them, but also because they typically illustrate the lack of relationship between research and mass campaigns in the South Asian region. Absence of a tradition of adult education research, a sense of urgency in the launching of campaigns, pressures to "show results" (a typical phrase, much in use in government parlance in the countries of the sub-continent) and unwillingness of government and research institutions to systematically learn from past experiences have made research irrelevant to the practice of adult education. Universities and research institutions are always willing to play to the tune of people in authority and rarely have their own agenda of research in adult education. The consequence of this situation is that little worthwhile research has been done in this important area. Worse still, benefit of systematic research is seldom available to educational planners, who seem quite comfortable making decisions which suit the dictates of higher authorities. Surprisingly, scholars in western countries have also not evinced interest in research in adult education in South-Asia, thereby denying to this region one of the prime motivations to develop research activity.

An agenda for adult education research has to be based on an analysis of the present situation, particularly the causes of its weaknesses. This analysis should, also take into account the dominance of government authority and decline in the independence of universities. Note should also be made of the peculiar characteristics of the Asian cultural milieu which gives much more importance to spiritual pursuits, oral learning and sanctions of the state, than it does to scientific enquiry, inductive analysis and on creation of a literate environment. We need, therefore, to go into the method and process of development of an agenda for adult education research. Such an exercise will, of necessity, oblige us to explore the political, societal and cultural dimensions. Only then we may refer to a few areas of possible study and to the institutional arrangements which must be brought into being to meaningfully continue a dialogue on this subject.

### Causes of the Present Situation

All the recent studies on the status of adult education research in Asian countries have shown that very little such research is going on in most of the countries. Even those which have compiled comprehensive bibliographies of adult education research accept that much remains to be desired in respect of the quantity as well as quality of research. It is, therefore, necessary to take a quick look at the main causes of this situation.

The principal cause of the poor standards of adult education research is that educational research itself has not yet come of age in most of the countries of South Asia.<sup>7</sup> It may seem strange that an attempt should be made to generalise about the situation in South Asian countries when each one of them is attempting to assert its distinct identity; they often have different political systems and barriers are being imposed by all of them to prevent academic and cultural interaction. In spite of these circumstances there are great similarities in situation in practically all these countries and the observations we make in the remaining parts of this paper are more or less applicable to all these countries. The main problems with the adult education research situation can be seen in the following parameters.

**1. Lack of academic programmes:** Adult education as a discipline has not taken roots in this region. Departments of Adult Education have been set up in one university after another since mid-sixties, but it is difficult to name even one in the whole region which has distinguished itself for good academic programmes or sound theoretical research. Universities which have instituted post-graduate diplomas, masters' degrees and research courses have not been able to sustain them. It has been difficult to attract students as well as teachers to these departments. In the absence of good academic courses it becomes difficult to prepare scholars who might undertake worthwhile research.

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Reference here is mainly to the countries which are members of South Asian Association for Regional Cooperation (SAARC).

**2. Absence of inter-disciplinary studies:** Several universities and research institutes in South Asian region have done notable work in disciplines related to educational/adult educational research. These include Psychology, Anthropology, Sociology, Economics, Linguistics, etc. Some sociologists and psychologists have, indeed, taken interest in educational research. However, their interest has been transient and the scope of research quite limited. Some scholars of linguistics have taken keen interest in literacy and adult education, but they did not succeed in building up a team for such studies. The result is that as these scholars leave their universities and academic institutions, the inter-disciplinary studies tend to disappear. All in all it would be fair to say that this region lacks the tradition of inter-disciplinary cooperation. This lack has obviously had an adverse effect on research in education/adult education.

**3. Weakness of methodological underpinning:** As in most social science research lack of methodological rigour is a serious problem in educational/adult educational research. Much of the adult education research being demand-driven (viz. responding to official demands) researches have been content to do a quick job on the lines expected by the sponsors. They know that lack of methodological refinement will not create any adverse impression and they do not have any motivation to be exact about methodology. Most of the research is in the form of evaluation studies - highly quantitative in nature, didactic, and simply sloppy.

**4. Attitude of people in authority:** Most of the adult education research in this region is confined to evaluation of programmes. Evaluations are undertaken not as a part of academic interest of the institutions concerned but at the instance of government agencies responsible for implementation of the programmes. Often the parameters of this study are also laid down by the official agency, whose interest is in 'quick appraisal' rather than a profound analysis of the interplay of the factors which have a bearing on the factors of the programmes. Since the disregard of the expectation of government agencies is not a done thing, research activities tend to remain confined to these official exhortations. The official agencies also tend to confine their interest to literacy programmes, to an almost complete disregard of other areas of adult and continuing education. Research programmes have, therefore, tended to remain confined to literacy programmes and to quantitative evaluation work. This whole situation points to an utter lack of understanding among policy makers and educational planners about the importance of independent adult education research.

**5. Shortage of funds:** Allocation of funds for adult education has increased manifold in all the countries of the region. The federal government in India spends more than 10% of its educational budget on literacy and adult education. Nepal has also decided to make a dramatic increase in provision of funds for this purpose. To a lesser degree the situation in other countries is similar. However, there is no clear policy about allocation of funds for adult education research. India spends about 0.5 percent of its adult education budget on research related activities. There is no specific provision for this purpose in most of the other countries of the region, but the actuals would be less than the percentage obtaining in India. University Grants Commissions, or authorities corresponding to them, allocate practically no funds to universities for adult education research, nor do Councils of Social Science Research. No charities or public trusts have shown interest in this field. Unfortunately external funding agencies - multilateral, bilateral as well as non-governmental - have evinced little interest in adult education research in this region. The result of this situation is that practically no funds are available for scholars and researchers wishing to undertake research of their interest.

It is obvious that the causes which have contributed to the unsatisfactory situation are of serious nature. It would be naive to think that an agenda for adult education research can be designed without making an effort to deal with these deep rooted problems.

### **The Process for Determining the Agenda**

The challenge of bringing about a change in the present situation calls for remedies which should correspond to the gravity of the problem. An exploration of the solutions will, no doubt, take us to the very nature of the adult education programmes and the manner in which various agencies deal with issues in adult education research. Some of the areas which call for attention are indicated in the following paragraphs.

**1. Review of the scope of adult education:** It is understandable that developing countries give priority to the elimination of illiteracy. This was one of the slogans at the time of their struggle for liberation and it also conforms to their ostensible commitment to equity. On the other hand, an increasing number of countries of this region are pledging themselves in favour of market economy, which will, inevitably, call for attention to development of human capital. This situation will demand achievement of a much higher level of literacy in the programmes of adult basic education as well as a stress on the development of new productive skills. As a logical corollary, there will also be a call for enlargement of the concept of literacy and adult basic education - to include an understanding not only of essentials of science and technology but also of informatics, cybernetics, etc. Such a change in planning of adult education programmes will have an obvious effect on research.

**2. Understanding the importance of AE research:** Policy makers, people who influence decision making, and senior personnel responsible for implementation of programmes do not appreciate the role and importance of adult education research. This is not only a symptom of the inherent scepticism among politicians and officials towards researchers. Most people in administration feel that issues in adult education and literacy can be handled by common sense and there is no need to employ the dilatory and bothersome process of involvement of the research people. UNESCO, its specialised institutions ( such as IIEP and UIE) as well as other inter-governmental and non-governmental organisations will have to make a determined effort to bring about a balance in the thinking of officials. The change in attitude will have to permeate people responsible for policy and funding of higher education. A proper understanding about the role and importance of adult education research will, without doubt, give a new dignity, sense of purpose and needed financial resources to scholars and researchers.

**3. Reorganisation of programme evaluation system:** A good deal of adult education research will perhaps continue to relate to programme evaluation. Systematically undertaken, this can be a great opportunity for universities and other institutions to relate their research back to the practical situation. This would open scope not only for interesting applied and action research, but may also make it possible to experiment with techniques of participatory research. The latter makes it possible to bridge the distance between researchers and "beneficiaries" and results in a concurrent improvement of the programme.

**4. Institutional support:** More than any other region of the world, South Asia needs to have a first rate international institute of adult education research. The extinction of the International Institute of Adult Literacy Methods, Tehran, has created a void which has harmed the cause of adult education research in this region. Efforts made during the last few years to revive IIALM, or to set up another institution have been fruitless. It is probable that the importance of an international institute is not fully appreciated by the leadership of UNESCO and other organisations which have the capability to establish such institutions. During its active phase, IIALM had succeeded in creating opportunities for energisation of research activity, improved documentation of significant happenings and a network of which the institution itself was the nodal-point. This is a testimony to the need for such an institution. In addition, each country needs to have a well-funded autonomous institution of adult education research. These institutions should have appropriate links with neighbouring countries as well as with appropriate institutions in other parts of the world. One of the important activities of the international and national institutions would be to regularly conduct courses in research methodology, dissemination and sharing of research outcomes and provision of a fora for adult education researchers to come together.

**5. Recognition of the discipline of adult education:** While adult education has been recognized as a discipline in the western countries for over 50 years, this has not quite happened in the countries of South Asia. It is not surprising that this should be so, because even the discipline of education is treated as synonymous with teacher training and a very small number of universities in the region have degree or post-graduate level courses in the discipline of education. Adult education is treated as a minor branch of education, not deserving of the status of independent discipline. With the phenomenal increase in the number of adult learners, including those who have enrolled themselves in correspondence courses and open universities, the problem of adult learning and education has acquired a new importance. Here again cooperation between universities of this region with well established universities of overseas can make an important contribution.

**6. International network and funding:** Measures have to be taken to earmark funds for adult education research. An action in this behalf can be stimulated by provision of funds from external agencies. It would also be necessary to take up systematic programmes for convincing the decision makers about the usefulness of research in adult education. That may facilitate untied funding. Establishment of cooperation within the countries of South Asia, with all the attendant problems, could be of great value. So also launching of joint programmes between universities of this region and overseas.

What has been spelt out in this paper is, perhaps, not the agenda of adult education research, but the groundwork for building an agenda. For too long, educational planners, particularly in the South Asian region, have tended to plan educational programmes without grappling with the fundamental problems related with this issue. A typical example of this mode of planning is the widely held assumption that if schools are opened parents will naturally send their wards to study, or if a good enough research agenda is put together, it will somehow get implemented. In fact, just as parental choice about sending, or not sending, children to school is determined by a wide range of considerations so also action on research designs depends on factors quite outside the parameters of the research agenda. What needs to be done is to create circumstances in which adult education research is placed on the agenda of educational development - that would be sufficient for the researchers and other concerned people to develop a meaningful agenda.

## Adult Education Research Trends in the Philippines

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This paper is divided into three parts: 1) the nature, characteristics and problems of adult education in the Philippines, 2) the status of research using UIE guidelines, and 3) an exploration of a possible research agenda for adult education in the Philippines.

Part One focuses on problems of adult education work in order to be able to use these as basis for the exploration of the research agenda. It includes data from interviews of key personnel and analysis of documents from a purposive sample of institutions pursuing actual adult education and/or doing some research. This sample is classified into four major sectors: 1) government organizations (GOs), 2) non-government organizations (NGOs), 3) academe and 4) church-related organizations. In the Philippines, these are the major sectors involved in adult education and/or adult education research.

A description of the activities of each of the above institutions is included in Appendix A.

Part Two discusses the status of adult education research based on the UNESCO guidelines, and Part Three outlines a possible research agenda for adult education in the Philippines based on problems and trends in the first two parts.

The education of adults has long been a neglected area in spite of the fact that all the Philippine Constitutions since 1898 and other legal documents have mandated some form of education towards "citizenship training, development of moral character, personal discipline, civic consciousness and vocational efficiency."

Historically, the principal reason for this neglect has been the almost exclusive reliance on the expansion of primary formal school provision to ensure the education of the general population. Unfortunately, while the educational system reports an average participation rate of 97.78% at the elementary level, the drop-out rate is equally high, with only 65 out of every 100 children reaching Grade VI.

Social demand for adult education remains a weak area, the preference being for formal education from which appropriate credentials could be obtained to assure employment, status and mobility.

Thus, in spite of the fact that since 1936, there has been an Office of Adult Education created by law, non-formal education services remain inadequate. Functional literacy programs, both public and private, serve only 1.06% of the estimated number of functionally illiterate persons who make up 26.8% of the 1989 population 10 years and above (EDCOM Report, 1991). The present education budget comprising 1.3% of GNP is the lowest among ASEAN countries, and is much lower than the Asian average of 3.3%. Of the four education services (elementary, secondary, tertiary, adult), adult education has the lowest budget.

### **The government sector**

The six government agencies included in the purposive sample generally conduct a variety of adult education activities on topics relevant to their mandates, current programs and identified sectors (e.g. literacy-numeracy training classes sometimes with a livelihood component, livelihood skills training of the cottage type, etc.). These activities take the form of short-term training programs utilizing conventional or, less often, media-assisted methods (e.g. school of the air) for specific objectives such as information dissemination, skills-training and capability-building.

It is interesting to note that no single government agency in the sample articulated self-reliance as an end-goal of its programs.

The problems associated with government-sponsored adult education programs may be analyzed from two perspectives: that of the agency and that of the actual and intended beneficiaries.

From the government side, at least five are identified:

- 1) Heavy reliance on foreign funding agencies with their own sets of priorities constrain actual choices.
- 2) While the integration of services among government agencies is indicated in the general plans, this does not usually happen at the ground level mainly due to the centralized nature of line agencies and functions of government.
- 3) Another problem is pedagogical: given that about 35% of the school-going population drop out at Grade V in an educational program that is generally poor in quality and conducted in English for mathematics and science, clients have difficulty in fully absorbing knowledge inputs requiring prior understanding of basic science and math concepts.
- 4) Due to the long-standing political conflicts in the country (the separatist movement of Muslim Filipinos in southern Philippines, rebel soldiers, and the communist insurgency in the rest of the country), the real objectives of adult education programs are sometimes confounded with counter-insurgency considerations. Organized groups suspected to be subversive, follow-up and monitoring activities after a training program are difficult to sustain.
- 5) Since training needs are massive because of the generally low level of education of the target population, there is a tendency to spread adult education services too thinly as to become one-shot affairs.
  - a) The low social demand for non-formal education rooted in the popular misconception that education is that which one gets from formal schooling, and in the widespread tendency to give more importance to education credentials rather than real skills, competencies and knowledge. Thus, the principal difficulty reported by agencies is the recruitment of intended beneficiaries.
  - b) When the clientele become interested enough to want to attend these education programs, still other problems arise, notably, difficulty in finding time and money to attend training sessions since time spent for education is time away from daily subsistence livelihood activities, resulting in irregular attendance and drop-outs from training.
  - c) Once the training program is completed, still another set of problems arises, notably in choices for the application of new knowledge.

Since monitoring activities (e.g. spotchecking) concentrate only on the actual holding of the training program, and evaluation is centered on clients' feedback immediately after the program, the above problems are not systematically documented and analyzed towards the improvement of future programs.

### **The non-government sector**

Adult education work in the NGO sector which appears to be the most significant adult education effort in the country differs substantially from that of the government sector primarily in scale and philosophy of development. However, insofar as some cultural, knowledge and knowledge-application factors are implicated in the analysis, there are similarities as well.

The nine NGOs included in the sample are mainly of two types: the first six are linked with the mass movement which since 1968 has called for the "transformation" of Philippine society along three main lines: economic self-reliance and political sovereignty, a more equitable distribution of the nation's resources and services, and a more participative democracy particularly for the greater majority who are poor and marginalized. The other three NGOs are basically private foreign welfare agencies engaged in voluntary work of various types.

Among NGOs of the first type, activities are classified according to development categories such as education, health, culture, science and appropriate technology. In many cases, these NGOs are allied with

people's organizations (POs). Moreover, at a certain point in their development, the need for integrated or multisectoral work was perceived by NGOs thus giving rise to 1) "multisectoral" work in which an NGO may serve several social groups, or 2) integrated work in selected communities known as socio-economic work. In both cases, the education component is always present; the scale is necessarily small; the scope, modality and orientation are substantially different from those of the government sector.

NGOs of the first type posit their education work in radical distinction from formal education work as it has been and still is being done in the Philippines. Formal education is essentially reproductive, alienated from daily life, and unintegrated in character. Thus NGO education work has three interrelated objectives: 1) to develop in the participants a new or even a counter-consciousness of their own life situations and their social-structural causes, 2) to develop the capacity to alter both personal and social situations, if necessary, and 3) to engage in these activities in an organized way.

The works of Paulo Freire on the "pedagogy of liberation" and of Lev Vygotsky on the development of mind in the context of social process have also had a significant impact on the conduct of popular education as undertaken by these NGOs.

Since the involvement of NGOs with their clienteles is usually long and sustained, and because they are directly linked with organized social groups, they have been able to avoid some of the problems of government agencies outlined in the previous section. However, other problems may be identified.

From the point of view of the NGOs as education agencies, at least four sets of problems may be identified:

1. The first has to do with the NGOs' definition of the social agenda and its implications on the nature of their education work with respect to government efforts.

As important elements of the mass movement, these NGOs share a common agenda directed towards "social transformation" along the three main lines indicated above. Necessarily, that agenda would include direct confrontation with the state and its agencies, in the context of political struggle. Here, the emphasis is on mobilization of social groupings for various campaigns on large social issues, often in the form of rallies and political demonstrations. In this context, the implication and danger for adult education work of the NGOs is to shortcut the essentially long process of education for cultural change and development of a cohesive social identity in favor of education purely for mobilization and campaigns, not to mention the possibility of education work degenerating to mere propaganda and sloganeering. A more serious consequence of these short-term methods is the possibility of bringing people into confrontational struggles which they may not have completely understood, and for which they will absorb the brunt of state repression.

A related problem with respect to the social agenda is that very often NGOs reject outright a possible fruitful collaboration in education and other work with government agencies for fear that the agenda may be "diluted" or that NGO personnel themselves may be coopted. While it is true that these fears have objective basis, a blanket refusal to work with government agencies could isolate the NGOs and prevent them from influencing the direction of national efforts towards adult education and social change in general.

2. A second set of problems has to do with the organization, staffing and financing of NGO education work. Unlike NGOs abroad which are able to avail of government funds, most NGOs of the transformational type have to rely mainly on foreign funding (from partner NGOs and other progressive organizations), and local volunteer work in the delivery of its services.

Three problems may be identified in relation to this situation. The first problem is related to the essentially short-term nature of project funding (maximum of 3 to 5 years) often forcing the NGOs to speed up work which, in the case of education, must necessarily be long-term. The second problem is related to volunteer work which, because of the essentially socio-political agenda, attracts politically committed activists who may not necessarily have the professional competence for the multifarious activities related to authentic capability building and development work. In this connection, attempts have been made by some NGOs to professionalize their personnel but these are not yet substantial or adequate. In addition, it must be mentioned that the relatively thin bench of professionals willing to do volunteer NGO work is also due to other factors: 1) fear of endangering their careers because linkage with NGOs is usually eyed with



suspicion by government, 2) economic reasons which force some professionals to work on a second or a third job, 3) the fact that after 1972 (declaration of Martial Law), many young professionals went underground and are still there or have been killed in the process, and 4) the serious brain drain in the country due to the labor export policy.

3. A third set of problems has to do with the popular education process itself. The emphasis on process and participation constitute a significant and welcome departure from the "banking" method as defined by Freire. Flexibility and user-specificity are important and valuable characteristics of this approach, as well as the use of Filipino (not English) as the medium of instruction. However, where no attempt at some generalization and theorizing is made, the temptation to do all kinds of "ad hoc" activities is great and sometimes no new knowledge is generated.

Evaluation is generally on the conscientization aspect or what participants felt or realized as outcomes of the process, and not on actual learning of new knowledge. This area of research needs further elaboration since it also true that on an informal basis, critical, analytical and problem-solving abilities appear to be developed. We have no systematic basis for this conclusion because of the absence of research in this area.

In this popular pedagogy, the demand on the teacher or facilitator is to systematize, synthesize and analyze participants' prior knowledge and experiences, and to add new knowledge in order to return these to the participants in an integrated and a comprehensive manner. Thus the real need for a more professionalized corps of facilitators.

Related to this is the need to develop instructional materials appropriate to the processual approach but incorporating knowledge and concepts necessary for the absorption of new technologies by the learners. The determination of NGOs to use the local and national languages for instruction is correct and admirable, but there is a need to address the problem of translating reading and other technical materials which are still predominantly in English.

Still related to the education process itself is for NGO adult education work to find a balance between specific and particular needs of participants and communities, and national issues and directions. This is very important particularly in the face of the deep divisions in the national community, the long-term neglect of marginalized groups especially indigenous communities and Muslim Filipino groups, the long-term political and ideological conflicts in Philippine society, and the weakness of the national identity.

The third set of problems has to do with the sustainability of NGO development efforts, including adult education. In this respect, there is a hidden paradox in the call for a more professionalized corps of adult education teachers because such professionalization needs also to be developed among the community folk who will eventually take over the NGO activities and whose present educational levels are even lower than those of NGO personnel.

Since no systematic studies have yet been made on the devolution of leadership to organized groups, what is the basis for decisions and activities that will ensure sustainability?

The second type of NGO is the integrated welfare-type foreign funded and implemented agency which combines long-term scholarly work (linguistic description and analysis), education, evangelization, relief work and socio-economic development in selected indigenous communities. The reported record of success for education work appears to be substantial but difficult to replicate by local NGOs in other communities because it is mainly reliant on the continued presence of foreign personnel and it is very well-funded. There are also questions raised in local quarters as to the actual level of self-reliance developed in the local community folk, the devolution of real power and autonomy to them, and the wisdom of relying too heavily on foreign personnel for development work.

### **The religious sector**

The impetus for the involvement of the religious (Catholic) sector in social action projects comes from the Second Vatican Council in which religious congregations redefined their mission to include social apostolates of the development type. Since most of the congregations operating in the Philippines also run schools usually for middle and upper-income students, social action projects usually begin as school outreach activities in "adopted" communities where students are exposed to the marginal conditions of the

poorer classes. In the process, projects are instituted in line with the congregations' thrusts and expertise (e.g. cooperative, ecology, business entrepreneurship).

Because of the close linkages between some progressive congregations and NGOs described earlier, their adult education and other activities share many characteristics, with the additional objective of evangelization by religious organizations.

One Catholic school included in the sample has gone farthest in setting up an integrated and autonomous extension program of community building, training and financial assistance for business entrepreneurship. This shows that the school's extension program functions as a more or less permanent consultant for individuals and communities selected for specific projects.

### **The academic sector**

The seven academic units included in the sample are premiere institutions of higher education in the country. Of the 7 units, four are degree-granting colleges and three are university centers for specific purposes (women, education, social policy).

As degree-granting units in higher education, research, extension and teaching are traditional concerns. Under the extension program, several types of activities are generally undertaken: 1) training programs for various clientele in the government or private sector (labor leaders, women, government bureaucrats, other professionals), 2) setting up pilot communities to serve as sites for student practicum, 3) mount information campaigns and advocacy activities on issues and relevant concerns, 4) serve as consultants for public and private sectors, 5) conduct evaluation and similar activities on its own or as commissioned by public and private agencies.

In general, the clientele served by these extension programs are professionals who seek further training in connection with their work in both public and private sectors. Strictly speaking in the Philippine context, the in-service training of professionals is not included under adult education. In a few cases, these programs also serve the marginal sectors but mainly in connection with student practicum activities. Thus the focus is not on adult education work per se but on the setting up of laboratory experiences for their students.

Research activities conducted by these agencies and the problems associated with these are detailed in the next section.

## **Status of Research in Adult Education in the Philippines**

### **1. Concept of Adult Education**

The discussion in Part One delineates the range of activities that comprise adult education in the country. However, in its current meaning and usage in the Philippines, two terms are generally used to refer to adult education, and they are not interchangeable.

For the lower-income, marginalized and less-educated sectors (e.g. out-of-school youths, farmers, women, workers, urban poor, etc.), the term *non-formal education* is used to refer to organized and semi-organized educational activities operating outside the framework of the formal school system, usually but not always carried out by government agencies to provide selected and practical types of learning according to a given set of priorities to certain sub-sectors of the population. For example, the Philippine Educational Theater Association's *Gender Sensitivity Training*, usually commissioned by government agencies and other organizations, focuses on attitudes towards the sexes, particularly women.

The term *popular or development education* is used to refer to educational activities carried out by NGOs and mass organizations outside of the formal school system in order to develop in the participants a critical consciousness of their own life situations and their structural causes, the capacity and competence to alter these situations if necessary, and to engage in these activities in an organized way. For example, along gender issues, the activities of the Gabriela Commission on Women's Health and Reproduction Rights (GCWHRR), an NGO promoting women's rights, include education work with and for women on women's health and reproductive rights, while the Social Development Index's activities include organization of 1) community-based daycare programs in depressed communities to answer the needs of the mothers in caring

for the children, 2) resource-building activities, and 3) consciousness-raising training for women. This type of education is frequently but not always offered to organized groups involved in the mass movement for social change. Where the group is unorganized, an organizing component is incorporated in the education activity.

*In-service training* of professionals to upgrade skills and competence, and *apprenticeship programs* carried out by companies and organizations in the context of employment are not included in the present concept of adult education.

## **2. *Determination of Adult Education Research Priorities and Establishment of Research Policies in Adult Education***

At present, there is no central agency coordinating adult education activities and research. Essentially this is a consequence of the relative neglect of adult education in the country, the lack of integration and coordination of adult education activities and the absence of a National Manpower Plan. Legislation intended to establish a *Philippine Center for Non-Formal Education* was introduced in the 1992 Congress but up to the present time (1993 Congress), it is still pending legislative action. Among other functions, the Center is expected 1) to make policy recommendations for the integration of adult education efforts, and 2) to promote the conduct of continuing research and development work. The Bill explicitly states that adult education efforts of both government and non-government sectors will be coordinated.

Specific to the promotion of literacy work in the country under the Education For All Program, the 1991 Congress passed Republic Act 7165 creating the Literacy Coordinating Council (LCC), an inter-agency body attached to the Department of Education. Among its functions are: 1) the "adoption of measures to boost research and development work in literacy by government and non-government organizations; and 2) to formulate measures on the establishment and maintenance of a national databank to support literacy efforts at the national and local levels.

To date, three research projects on literacy work have been commissioned by LCC through the Bureau of Non-Formal Education under the Department of Education (DECS-BNFE) to two agencies: the National Statistics Office for literacy mapping, and the Education Research Office of the University of the Philippines (UP-ERP) for 1) the assessment of the DECS-BNFE national basic literacy program and those of three NGOs, and 2) an ethnography of functional literacy in 14 communities types in the country. It is expected that these three research studies will be used as basis for subsequent program planning in the literacy program of the Department of Education.

Apart from these recent research efforts, research in adult education has been of three types: 1) at the agency level, data-gathering as part of the inputs into program planning; monitoring and evaluation of actual training programs; 2) at the level of university research, basic and policy related research related to the academic units' areas of specialization, graduate theses and dissertations, and commissioned evaluation studies of agency programs; and 3) at the level of NGOs, community or group-specific data related to program planning and impact studies. The documentation for the first and third types of research leaves much to be desired.

In the absence of a national or even university level research agenda on adult education, and a research clearing house at various levels, these researches while perhaps numerous, remain unsystematized and unutilized. Except for commissioned policy and evaluation studies, university research suffers from the same under-utilization.

One recent effort towards systematization and utilization has been made by the Philippine Association of Graduate Education (in cooperation with the Department of Education) which has compiled a general annotated bibliography (3 volumes) of Philippine educational research covering the period from 1975-1991. It is significant to note that researches on non-formal education and community-school linkage have the smallest number of entries.

In general, the following are the characteristics of researches listed in these volumes:

- a) On account of the limited time and financial resources available for graduate theses and in the absence of a clear research agenda at whatever level, the researches are very narrow

- in scope, many at the local community or provincial level, without possibility of synthesizing several studies to allow for second-order abstractions.
- b) The main areas covered by these researches are: evaluation and impact studies of non-formal community, school-outreach and skills training programs of various government agencies; proposals for institutionalization of certain programs; and needs assessment of non-formal education and manpower demands.
  - c) A very large percentage of the studies do not appear to have been derived from a theoretical framework, or even a theory-based conceptualization of the problems. The research approach is predominantly positivist.
  - d) The preferred methodology appears to be the one-shot normative survey with quantitative analyses used very often. In a few cases however there is evidence of attempts to develop designs with greater explanatory and predictive value.
  - e) There seems to be no evidence of any modalities of cooperation among the researches listed in these volumes, or attempts to do collaborative research in order to widen the scope of research and increase the generalizability of results.
  - f) Significantly, none of the research studies addresses the adult education work of NGOs (under the popular education mode) in spite of the fact that they are at present the most active in adult education.

### ***3. Organization and Management of Research in Adult Education***

At present, there are no autonomous research institutions engaged in educational research. A university-based research center is usually attached to a specific academic unit and therefore pursues research according to its thrusts and objectives. In the University of the Philippines, there are a few university-level multidisciplinary research centers and one of them, the UP-ERP established in 1991, is concerned with education. Another center is the University Center for Women Studies (UCWS) which was conceptualized to form part of the national commitment and the global effort towards the advancement of women's cause and to link academic concerns to the women's movement. Its thrusts are to 1) create and sharpen awareness of women and other gender-related issues in the University as well as the larger society; 2) encourage and strengthen teaching, research, extension and advocacy programs on and for women; 3) strengthen and vitalize Women Studies' multi and interdisciplinary program; and 4) initiate the integration of gender concepts in the academic curricula of the University.

Apart from graduate training, there are no institutionalized mechanisms for the training of young researchers, except upon the initiative of senior researchers who may decide to train and collaborate with their assistants on a long term basis. Such collaborations are quite rare however. Recently, however, with the collaboration of DECS-BNFE and UP-ERP in two adult education researches, efforts were made to assign local non-formal education coordinators to participate in the research as team members.

### ***4. Dissemination and Utilization of Research Findings***

In the Philippines, the main problem in the dissemination and utilization of research findings are: 1) absence of research clearing houses for specific fields, 2) relative inaccessibility of the material due to language (English) and the jargon, 3) absence of a real research community even within and among universities. More basic underlying reasons could be as well the weakness of the scientific culture in the general public (including professionals), and the largely "oral" character of the culture.

Still, for various categories of users, the usual venues are as follows: 1) research digests and professional journals for researchers themselves, policy-makers and planners; 2) symposia and forums where papers are read and publications made available for professionals and advocates; 3) occasional research conferences for researchers, planners and professionals; and 4) some newspaper articles for the general public.

It should be noted however that the general public does not usually read English, while newspapers in the local language do not run articles on research results.

There is no journal or publication specifically on adult education, although occasional articles are printed in university-based journals.

### **A Proposed Research Agenda for Adult Education Research in the Philippines**

Three considerations underlie the identification of research priority areas for adult education in the Philippines: 1) the requirements of the pending Congressional Bill (HB 160) expected to be enacted into law in the 1993 Congress establishing the Philippine Center for Non-Formal Education, 2) the trends and problem areas indicated in Part One of this paper, and 3) the general areas indicated by a theoretical paradigm (attached) for conceptualizing educational research problems.

Overlapping areas are expected in this enumeration.

The research requirements as identified in the present research study for each of these considerations are given below in a programmatic fashion:

- 1.0 **Research requirements towards the establishment of the Philippine Center for Non-Formal Education**
  - 1.1 State-of-the-art review of adult education research in the Philippines, and identification of practicing researchers nationwide
  - 1.2 State-of-practice review of the nature, characteristics, philosophies, problems, methodologies of adult education work in the Philippines, and identification of adult education practitioners and advocates nationwide (also, comparative analysis of state-of-the-art and practice reviews with other Southeast Asian countries)
  - 1.3 Compendium of manpower skills required under each regions' development plans and matching these with a survey of available skills and competencies
  - 1.4 Case studies of successful adult education programs with a view to identify factors associated with success/failure
  - 1.5 Compendium of existing evaluation measures with a view to developing training standards for proper evaluation
  - 1.6 Analysis of legislation (particularly those with a strong community-based orientation) to determine priority learning areas for adult education programs
  - 1.7 Translation of relevant legislation into Filipino and other major Philippine languages (8)
  - 1.8 Comparative policy analysis of adult education programs of various government agencies with a view to formulating a comprehensive education policy
- 2.0 **Research projects indicated by trends and problems delineated in Part One**
  - 2.1 Comparative analysis of the delivery of adult education services, with a view to integration at the local government level (as provided by the 1991 Local Government Code)
  - 2.2 Accreditation of non-government and other private organizations conducting adult education nationwide, with a view to minimizing harassment of personnel and clients by military and para-military forces
  - 2.3 Study of factors associated with sustainability of adult education programs, including devolution of management of these programs to local groups or to the clients themselves
  - 2.4 Comparative studies of pedagogical approaches to adult education and impact on adult learning and application
  - 2.5 Comparative analysis of indicators and procedures to monitor progress of programs
  - 2.6 Study of training competency needs of trainers and para-teachers, with a view to developing a corps of non-formal educators
  - 2.7 Study and development of a professional degree in non-formal education
- 3.0 **Research areas based on a theoretical paradigm for conceptualizing educational research problems**

- 3.1 On the antecedents of adult education
  - 3.11 Entry level skills, attitudes and related background characteristics of adult learners by sector
  - 3.12 Status of indigenous knowledge in various community types (e.g fishing, farming, etc.)
  - 3.13 Comparative analysis of modes of recruitment for adult education
  - 3.14 Development of a methodology for rapid social analysis of communities (to determine social context)
- 3.2 On the process of adult education  
(already indicated in 2.4 above)
- 3.3 On immediate outcomes
  - 3.31 Development and pilot testing of modes of evaluation for various types of adult education activities
  - 3.32 Development of taxonomy of specific cognitive and non-cognitive outcomes
- 3.4 Long-term outcomes/impact
  - 3.41 Development of modes and indicators of evaluating long-term outcomes (e.g. political participation, productivity, etc.)
  - 3.42 Study of decision-making processes in application or rejection of new knowledge

## Appendix A

### Description of Selected Adult Education Activities in the Philippines

#### 1.0 Government Sector

##### (1) DECS-Bureau of Non-Formal Education (DECS-BNFE)

DECS-BNFE is the agency which pursues the adult and non-formal education program of the government. Its programs, which are community-based, are on functional literacy and numeracy integrated occasionally with livelihood and values development components. Programs include short-term courses on literacy and livelihood training.

One of its projects is the *Magbassa Kita* (Let's Read), a 5-year program (1987-1992) addressing the problem of illiteracy in all the regions of the country. It did not have a livelihood component so it had a problem in making the trainees stay and attend regularly. Also, the effectiveness of the program in improving the competency of the learners could not be ascertained because there was no follow-up activity, and monitoring was vague and ineffective.

DECS-BNFE has recently conceptualized a comprehensive program of research which would lead to the improvement of the design and delivery of its literacy and continuing education programs nationwide. The two major research programs are: 1) literacy mapping of 10 provinces with low functional literacy rates undertaken by the National Statistics Office (NSO), and 2) an ethnographic study of functional literacy and its opposite (functional illiteracy) in 14 Philippine communities representing various community types. UP - Education Research Program is doing this study.

##### (2) Technology Resource and Livelihood Center (TLRC)

The TLRC, established in 1977, operates directly under the Office of the President. It provides training on livelihood/enterprise development through conventional and media-assisted methods. The conventional method, or the formal training program, caters to the A-B-C group who pay and enrol in these training classes. The media-assisted method which utilizes the television medium to teach and train, through its two television shows, caters to the D-E group.

The identification of priority areas and the design of its programs are based on the Medium-Term Development Plan (MTDP) of the National Economic and Development Authority (NEDA), the Technology Agenda of the Department of Science and Technology (DOST) and the Livelihood Agenda of the Department of Trade and Industry (DTI). For its formal training, it conducts an actual needs assessment of its participants.

##### (3) Department of Social Welfare and Development

DSWD implements programs and services that are related to psycho-social interventions, skills training, social mobilization, institution- or center-based programs (capability-building of its staff), adoption, disaster management and social research.

One such program is the *Productivity Skills and Capability Building Program* (PSCB), which integrates the Social Communication Skills Development (SCSD) package and Livelihood Skills Training. Its target clients are the disadvantaged women in fourteen (14) provincial regions, including the National Capital Region (NCR). It defines the term "disadvantaged" as having a limited or no access to education, being victims of involuntary prostitution, or illegal recruitment, and being a battered woman. The SCSD package, on one hand, includes trainings on numeracy and social communication skills development, self-enhancement and community participation. The livelihood training aspect, on the other hand, includes sewing craft, toy craft, and food processing/preservation.

Priority areas in its program are identified based on 1) incidence of poverty, income and unemployment, 2) availability of basic services in the area, and 3) the funding requirements of the project.

#### **(4) Department of Agriculture (DOA)**

The DOA gives training on various aspects of agriculture. Its clients consist of the farming and the fishing sectors, and rural women. Its training program aims to make these sectors technically-capable and prepared for technology transfer. Trainings for rural women include bio-gardening, livelihood skill/income-generating projects and cottage-making.

To accommodate illiterates, or those with low level of understanding, the training utilizes popular methodologies. It must be noted, however, that DOA's training programs are not long-term skills-development programs.

#### **(5) Philippine Information Agency (PIA)**

The Philippine Information Agency's mandate is accurate, timely and relevant information. Its programs are geared towards informational, educational and communication activities. Its end-goal is to enable people to participate in democratic processes by helping them understand the issues.

PIA's choice of clients depends on the issue being promoted. For example, on the issue of the *Cordillera Autonomous Region* (CAR), its clients are the people of Cordillera; for the *Philippines 2000* program of the government, its clientele consist of the entire population.

#### **(6) Nutrition Service (NS)**

The Nutrition Service is the nutrition arm of the DOH. It advocates mothers' classes, which are conducted in every Regional Health Units or Bureau of Health Service. Clients, who are mostly short-term and whose attendance is irregular, are mothers of 3rd or 2nd degree malnourished children. Trainings or lessons focus on nutrition and the different ways of rehabilitating their children.

### **2.0 NGO Sector**

#### **(7) Philippine Educational Theater Association (PETA)**

Since its establishment in April 1967, PETA, the leading theater group in the country, has 1) mounted productions and performances of socially-relevant plays, most of them original, contributing to the enrichment of Philippine contemporary theater through the study and use of various theatrical forms to ventilate local, national and international issues; 2) conducted training programs and developed a curriculum in People's Theater through workshops; 3) initiated efforts geared toward theater networking and organizing, promoting the emergence of drama groups based in schools, parishes, communities, sectors, regions and even overseas; and 4) disseminated studies, reports of experiences and products of its own and those of the network's cultural and theatrical works through its research, documentation and publication programs.

PETA has four programs: 1) the Kalinangan Ensemble (KE), 2) the School of People's Theater (SPT), 3) the People's Theater Resource Center (PTRC), and 4) the Special Programs. PETA also conducts training programs exclusively with an NGO partner.

The design of the program, meanwhile, is based on methods and contents which participants can identify with. PETA utilizes existing cultural and physical materials in their training programs to revitalize traditional cultural forms.

#### **(8) Ecumenical Institute for Labor Education (EILER)**

An organization concerned mainly with the education of workers, EILER is a national workers' institute with regional chapters in all the Philippine regions. It was formed in 1981 with the end view of "liberating workers from the bondage of their employers and empowering them by providing them with education." Thus, it views adult education as a liberating mechanism.

Its education component, called *Pandayang Manggagawa* (industrial worker), has a ladderized program consisting of five different courses. These are: 1) Genuine Trade Unionism, 2) Union Administration and Management, 3) Educators' Training (multiplying effect or trainers' training), 4) Leadership Formation, and 5) Management.



EILER also has a training component called *Daup-Palad* (helping hand), which gives technical and management trainings to workers, union members and leaders.

It publishes two regular publications: 1) **Talagawa** for selected reading and 2) **Datos** for mass reading.

#### (9) **Gabriela Commission on Women's Health and Reproductive Rights (GCWHRR)**

Feminist movements have been the trend in recent years. This may be attributed largely to the growing consciousness of the strong gender bias against women and the realization that women are no less human and able than their male counterparts. Gabriela is only one of the many representative organizations (feminist movements) which has advanced the cause of women.

Gabriela is a coalition of women's organizations with eight commissions, one of which is the *Gabriela Commission on Women's Health and Reproductive Rights* (GCWHRR) established in 1987. These various commissions coordinate with each other but operate autonomously.

GCWHRR has four lines of services: 1) health (medical/clinical), 2) education, 3) research, and 4) community work.

It also engages in information and dissemination campaigns concentrating on various health issues (*e.g.* AIDS and family planning) through comics, posters, wall news, publications and modules. In addition, it mounts shows that can impart knowledge of health issues/concerns in the shortest time possible.

#### (10) **Community Extension and Research Development (CERD)**

The main objective of CERD's education program is to equip leaders and members of people's organizations with the knowledge, skills and attitudes, particularly analytical, research, planning, monitoring and evaluation skills, that will enable them to manage their organization more efficiently, to be self-reliant and to achieve empowerment.

Its educational activities are geared towards raising the level of the community's awareness of environmental issues and facilitating discussions of local and national events taking place and how these affect the people. Most notable of its awareness courses is the Basic Course on Marine Ecology Awareness. Incorporated into these activities is the conduct of programs ensuring that leaders are developed into trainers or educators.

#### (11) **Summer Institute of Linguistics (SIL)**

SIL is an international private voluntary agency involved in 1) analyzing grammatical and phonological systems of Philippine languages and publishing results of linguistic and anthropological research, 2) collecting and publishing texts in local languages, 3) conducting literacy classes and training mother tongue literacy teachers and supervisors, 4) preparing primers, dictionaries and other vernacular books, 5) translating the Holy Scriptures and other literature, 6) participating in health care training programs and community involvement projects that promote self-sufficiency, and 7) cooperating with government agencies, NGOs and educational institutions by making available research, technical expertise, training and other services. It came to the Philippines in 1953 upon the invitation of the then Pres. Ramon Magsaysay.

#### (12) **Social Development Index (Index)**

Index was formed in 1978 with the family as the original and exclusive focus of concern. In 1990, its focus was changed to women and day care programs. Its training on the organization and management of community-based day care programs does not only answer the needs of parents in terms of caring for the children, but also answers the need to strengthen the collective action of the community. Aptly, the methodology utilized in this program is community organizing.

Index considers adult education as geared towards the disadvantaged sector and focused on survival and improving the general quality of life among its trainees. For this reason, its target clients, who are mainly women and daycare workers, belong to the marginalized sector.

To fill the gaps in its education services in pilot communities, Index turns to its network and linkage resources. For example, because it does not have a health or land rights training program, it requests its partner NGO to conduct trainings on these topics/issues. It believes that networking with other NGOs makes its programs more effective, and at the same time empower them.

#### **(13) Translators' Association of the Philippines (TAP)**

TAP, established in 1983, has the following programs which are both integrated and complementary in their work with the cultural communities: 1) literacy (basic and fluency level), 2) health education, and 3) small-scale livelihood development programs.

TAP also engages, in these cultural communities, in linguistic and anthropological studies, translation of local materials into English and Filipino, and publication of dictionaries and results of its studies.

#### **(14) Mercy Corps International-Philippines (MCI)**

MCI's main activities are the: 1) provision of emergency aid to victims of natural and man-made disasters in terms of food, medical aid and housing, 2) development of self-reliance among target clientele by engaging them in food production and income-generating activities, 3) community organizing, and 4) promotion of Christian values.

In 1989, it introduced the Hill-Tribe Agricultural Project which focused on the Aeta community (cultural community). The project aims to provide assistance in agricultural technology training, literacy, small-credit assistance, community organizing and cooperative development. Livelihood training includes fishpond-making, sloping agriculture land technology (SALT) and backyard gardening.

#### **(15) Education Forum (EF)**

EF is the task force on education of the Association of Major Religious Superiors in the Philippines (AMRSP). It is a service agency organized to provide assistance to educational institutions as well as groups and individuals who are engaged in the reorientation of Philippine education towards justice and social transformation. It operates nationwide through its chapters all over the country.

Its seven programs and services are: 1) Teacher Assistance Program (TAP), 2) School for the Advancement of Nationalist Education (SANE), 3) Education Resource Center (ERC), 4) Alternative Instructional Materials (AIM), 5) School-Community Outreach Program (SCOP), 6) Solidarity Program (SOP), and 7) Education with Production.

TAP is a monthly publication on current socio-political and economic issues that comes as a series of supplementary materials for teacher and classroom use.

SANE is the seminar arm of EF which conducts training programs, seminar-workshops, summer institutes, lectures, fora, exposure-immersion programs for educators and NGOs. Its services attempt to operationalize and give flesh to the Nationalist Agenda for Philippine Education (NAPE) through interventions in curriculum, instruction, evaluation, teacher training, and alternative instructional materials. The seminar packages include: Literacy-Numeracy Facilitators Training, Social Orientation Seminar, Values Education, Curriculum Development and Instruction, Para-Teacher Training, and facilitation services for conferences, conventions and general assemblies.

NAPE is a comprehensive Education Agenda prepared by a non-governmental Coordinating Committee for Nationalist Education (EF included). Providing the over-arching framework for all EF's courses and services, it proposes the fusion of the formal and non-formal programs into one education system.

ERC is the research arm and materials resource base of EF for the development of a databank on education, production of audio-visual materials for instructional use and publication of studies and researches on education.

AIM develops and publishes curriculum materials, lesson plans, source books and teaching guides, and serves as clearing house for instructional materials developed by teachers from EF-related and other schools. It also publishes the *EF Curriculum Journal*.

SCOP, the extension arm of EF, assists educational institutions in setting-up school-based community outreach program which focuses on literacy and numeracy, health, sanitation and nutrition, livelihood skills training programs, and continuing education. It has developed and published a module for functional literacy and numeracy training.

SOP is EF's linkage arm which develops/maintains solidarity with other institutions, groups and individuals, in the Philippines and abroad, with the same vision and mission through its foreign volunteer program, training workshops, exposure-immersion trips and related services.

The Education with Production program envisions to create the necessary conjunction between the school system and the development needs of the community through its integrated School-Community Production Plan. The program has 4 pilot communities nationwide where functional literacy and numeracy training is integrated with livelihood skills training and organic farming.

### 3.0 Academic Sector

#### (16) UP Center for Women Studies (UCWS; UP = University of the Philippines)

The UCWS, a university-wide unit of the UP System, was conceptualized to form part of the national commitment and the global effort towards the advancement of women's cause and to link academic concerns and resources to the movement.

It has six programs and projects: 1) research, 2) training and outreach, consisting of workshops and short-term training programs, 3) publications, 4) resource collection, 5) curricular program, and 6) networking. UCWS, through its various activities, strives to find gaps in women studies and tries to fill this gap.

#### (17) UP School of Labor and Industrial Relations (SOLAIR)

The UP-SOLAIR is the country's leading institution that offers graduate instruction, conducts researches, and provides educational services to labor, management and government in the field of labor and industrial relations.

One of the major functions of SOLAIR is its continuing labor education and extension work with trade unions, farmers' groups, cause-oriented organizations, management groups, government agencies, NGOs and other labor-related institutions on campus and outside. Extension services include varied training activities on labor and industrial relations, seminars, workshops and conferences. Its most successful extension program is its Workers Institute on Labor Law (WILL), a walk-in course designed specifically for the layman who wishes to learn about labor laws and labor relations.

#### (18) UP College of Public Administration (CPA)

The UP College of Public Administration (CPA), through its Local Government Center (LGC) and the Center for Policy and Administrative Development (CPAD), conducts training programs for the management/supervision level of government agencies, government employees and NGOs.

The CPAD, among others, designs and conducts studies of basic institutions of governance, executive leadership, administrative culture, organizational development and national-local relations; designs and conducts training courses in policy analysis, management principals and processes, project development and management, evaluation research and other specialized courses in governmental management; plans, conducts and coordinates cross-country training programs on management and development administration for mid-career executives; and undertakes policy research on urgent national issues and agenda and evaluation studies of management functions and processes.

The LGC, on the other hand, conducts basic research on selected topics on local government and produces materials for course offerings of the College, and extends technical assistance and consultancy to local authorities. It also conducts continuing training for local officials and employees as well as for those in agencies involved in activities related to local government. It has a long-running *Local Administration and Development Program* (LAPD) which it conducts in collaboration with the Department of Interior and

Local Government. Its short-term courses cover such areas as personnel management, public policy, tax codification, local resources mobilization, development planning and rural development.

**(19) UP-College of Home Economics (UP-CHE)**

The Office of Community and Extension Services of the UP-CHE serves as the extension arm of the College. Its short-term course offerings include Child Care-Givers Training, Parent Education, Teacher Training, Basic Industrial Sewing Machine Operation, Food Service Management, Hotel Front Office and Housekeeping, and Management of Food Processing Plants. Clients are mainly pre-school teachers, homemakers, industrial workers and entrepreneurs.

**(20) UP - Education Research Program (UP-ERP)**

The UP-ERP, established in 1991 under the Office of the President of the UP, is expected to be the nucleus of a major inter-disciplinary undertaking to assess aspects of the total educational effort of the country, and to propose reforms and policies towards its improvement. One of its primary tasks is to critically examine important aspects of the education that UP itself offers to its students.

It assists the University in assessing its own academic and extension programs and services; in enhancing the University's leadership role in education; and organizes faculty members in the various disciplines to undertake studies on problems, issues and alternatives in Philippine education. It generates knowledge and promotes understanding of Philippine education to be applied in policy-making, policy evaluation and educational reform.

Aside from the institutional or in-house researches it does, UP-ERP also initiates research and policy studies on education. It is, at present, undertaking an *Ethnography of Functional Literacy* in 14 communities, representing different community types, all over the country. This project is funded by the DECS-BNFE. It is also in the initial stages of pilot testing in 3 schools the Basic Education Curriculum proposed by EDCOM. There is also an on-going research study on *Financing Quality Education: Focus on Higher Education in the Philippines*, funded by UNESCO Paris.

UP-ERP also undertakes commissioned research studies. It has completed the study, which was commissioned by DECS-BNFE, on *The Efficiency and Effectiveness of Literacy Programs in the Philippines*, including the national literacy program of DECS-BNFE.

Its networking and development activities include the ongoing development of a databank on higher education and a specialized library of basic education. It is also developing an evaluation package for use by other higher education institutions based on the *Continuing Assessment of Knowledge, Attitudes and Value Study in UP Degree Programs (KAVS)* which it has completed.

**(21) Ateneo Social Policy Center (SPC)**

The Ateneo Social Policy Center, which started in 1986, aims to 1) influence policy and directions in the fields of politics, governance and development, and 2) articulate and substantiate aspects of development alternatives and the agenda of non-governmental organizations and people's organizations. Its thrusts are on bureaucracy and Philippine politics.

Its activities are geared towards research, seminars/trainings, video productions and information dissemination and campaign on relevant political issues. It has six pilot communities for its project on the assessment of NGOs' and POs' participation in local governance.

**(22) DLSU Night College**

The DLSU Night College, an offshoot of the Night High School program of its sister school, was established in 1992 as an extension program of the University. It aims to make Lasallian education accessible to students who otherwise cannot afford college education; develop Filipino entrepreneurs; and provide a program that will enhance graduates' productivity and usefulness to society. It offers BS Commerce in Management and an Associate Diploma in Business Management at no cost to adults from the lower-income groups.

The Night College is formal in structure and is accredited by DECS.

#### **4.0 Religious Sector**

##### **(23) Mother Rita Barcelo Outreach and Livelihood Corporation (MRBOLC)**

The MRBOLC is an extension program of the Regina Carmeli College (RCC) which is run by the Augustinian Sisters. It is a private, non-profit, non-stock corporation with a personality separate from RCC. It aims to undertake a program of community building by 1) organizing the communities to be cohesive and self-reliant, and 2) extending financial, technical and consultancy services to micro and small enterprises. The first program is undertaken by the Outreach Program while the second program is handled by the Business Resource Center.

The major activities of the Outreach Program are focused on 1) community-building management, 2) human resource development, 3) micro-enterprise development, and 4) health and nutrition services. Literacy and numeracy lessons are incorporated in these training activities. Examples of livelihood training programs are RTW garments production, rice vending project, and multi-purpose cooperatives.

The Business Resource Center, on the other hand, offers 1) consultancy services, 2) training activities, 3) business information (e.g. demographic data on the area, comprehensive data on consumer-market size, labor participation rates), and 4) financial assistance to realize its goals. Training seminars include Project Development and Management, Cooperative Education, Simple Bookkeeping, Basic Community Organizing and Community Organization Volunteers' Training.

##### **(24) Augustinian Sisters**

The Augustinian Sisters of Our Lady of Consolation's main educational activity for adults is their cooperative education which aims to prepare people and community organizations to manage their own livelihood and cooperatives. Its training programs consist of different levels and phases of cooperative education. To accommodate illiterates and the low level of comprehension of some of the participants, the training programs use the local languages in the community and utilize the participatory approach. Cooperative education has also been institutionalized in their different schools.

##### **(25) Maryknoll Sisters**

Since the Maryknoll Sisters turned over its school, the Maryknoll College, to private individuals, its main activity is characterized by the involvement in different organizations under the Association of Major Religious Superiors of the Philippines (AMRSP) like the Task Force Detainees, and Justice and Peace Commission. It also maintains its Institute of Formation and Religious Studies under a formal structure or setting.

The Congregation believes that environmental education is needed in the country, particularly in Baguio, which was one of the hardest hit area during the 1991 earthquake. At present, it offers retreats/workshops in Baguio which caters to professionals and groups who request for such an activity. The retreat uses the eco-feminist perspective, and includes the justice aspect and the spiritual dimension of creation.

# **Adult Education Research Trends in the Western European Countries**

With special reference to university-based research

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## Introduction

This report is a part of an international research project organized by the UNESCO Institute for Education (UIE) in Hamburg. The project is entitled **Adult Education Research: A World Trend Analysis**. Almost simultaneously with the launching of this UNESCO project, the newly established European Society for Research on the Education of Adults (ESREA) embarked upon a similar study entitled **State of the Art Study of Research on the Education of Adults in the European Countries**. In close consultation, UIE and ESREA agreed to co-operate and it was decided that the ESREA study would comprise the European input to the UIE world-wide study. Furthermore, it was decided that the ESREA study would produce two integral reports which would deal with the Western European countries and the Central and Eastern European countries respectively. Dr Barry J. Hake of the ESREA Secretariat co-ordinated the ESREA project and prepared the ESREA report for the Western European countries. Dr Zoran Jelenc, Slovene Adult Education Centre, Ljubljana, was invited to prepare the ESREA report for the Central and Eastern European countries.

## Background to the ESREA 'State of the Art' project

A number of recent publications and ongoing research projects, some commissioned by the European Commission, will soon provide descriptive statements of the current situation with regard to the structures of adult and continuing education, vocational education and training, adult residential education, the training of adult educators, a directory of organizations and establishments dealing with adult education, and policy developments and trends in the countries of the European Community. There is no detailed study, however, of the developments and trends which characterize the nature, organization and funding of research on the education of adults within the European Community. In particular, there is no study of the specific contribution made by university-based research to the development of the knowledge base about the education of adults whether by means of fundamental or applied research.

The need for such a study at this point in time is indicated by a number of important developments including:

- \* the increasing importance of adult and continuing education as a specific element of policies for human resource development in the economic and social sectors at both the national and European levels;
- \* ongoing changes in the systems of funding university-based research in a number of countries;
- \* the current financial and manpower crises, together with a major reorientation of university-based research on the education of adults, in the countries of Central and Eastern Europe;
- \* growing co-operation in research between universities in different countries, including the recent creation in late 1991 of **ESREA – the European Society for Research on the Education of Adults**;
- \* institutions of higher education other than the traditional universities, for example the polytechnics, are developing a research potential in the area of adult and continuing education;
- \* aspirations to encourage more co-operation in the post-graduate training of young researchers, to enhance the mobility of researchers throughout the European Community, and to transfer research knowledge and skills in support of colleagues in the Eastern and Central European countries;
- \* discussion in the research literature with regard to the disciplinary, multidisciplinary and interdisciplinary basis of research into the education of adults and its location within the structures of universities;
- \* a growing interest in the reconsideration of a distinctive 'European' contribution to research on the education of adults in comparison with the English-language Anglo-American literature;

The establishment of the **European Society for Research on the Education of Adults (ESREA)** created the ideal forum to encourage university-based researchers to co-operate in undertaking a rigorous comparative study of the 'state of the art' with regard to research on the education of adults throughout Europe. This would allow **ESREA** to make a more effective analysis of developments and trends in Europe and to propose recommendations for financial support, within the terms of the European Commission's new proposals for a Research and Technological Development Programme in the Field of Human Capital and Mobility, with a view to stimulating a stronger European-wide research infrastructure for the rapidly developing areas of adult and continuing education. This programme will provide support for:

- \* the development of a Community system of research training fellowships;
- \* the creation and development of European research networks for scientific and technical co-operation;
- \* launching of a Community system of 'R&D Euroconferences'.

### **Research plan in phase one**

The ESREA 'State of the Art' project is planned in three distinct phases. In the **first phase, 1993-1994**, country reports have been prepared by recognized experts, all members of ESREA, from all the European countries. These reports comprise a qualitative trend analysis. The **second phase, 1994-1995**, is intended as a quantitative study of ongoing research within the university sector in the European countries. It is intended that this will enable ESREA to establish a data-base of research on adult education. During the **third phase, 1995-1996**, the results of the research will be disseminated and discussed with the members of the scientific forum in national and a European meeting.

### **Research methodology of phase one**

The national contributors to the ESREA study were invited to prepare country reports which would have a qualitative rather than a quantitative nature. They were requested to undertake in-depth interviews with four acknowledged experts in their own countries. To this end they were provided with a research instrument which comprised a list of topics to be used in conducting the open-ended interviews. They were requested, furthermore, to indicate clearly when this list of topics contained obvious examples of culturally biased items which were not able to capture the every-day understandings of university-based research in their own country. The country reports would subsequently be analyzed by the project co-ordinator and brought together in an integral report.

In the implementation of the research in the Central and Eastern countries, it proved necessary to modify the ESREA research instrument in order to accommodate the prevailing situation in these countries following the major societal and economic changes since 1989. To this end an additional set of questions about social, political and economic conditions was circulated to the contributors. For more details see the relevant report by Dr Zoran Jelenc.

For the Western European countries, it was not found necessary to modify the research instrument during the research. Although the French country report commenced with a critical discussion of the terminological questions surrounding the use of the term 'adult education' in relation to the terms generally used in France, it still proved possible to prepare a country study on the basis of the research instrument. It must be pointed out, however, that the country studies varied considerably in the degree to which they explicitly applied the chosen research methodology. This seems to be a continuing problem in this kind of international research even when a common research instrument is available. Nonetheless, the country reports did make use of the research instrument in structuring their data and this facilitated the analytical phase and the preparation of the integrative report. However, it must be indicated that not all the country reports were available to the project co-ordinator at the time requested to facilitate the analytical phase. In most of these cases, the country reporters made complementary materials available for the purposes of the research. This has reduced in some measure the validity of the findings reported in this report, which has been based largely upon the available country reports together with the complementary materials. This



report must be regarded, therefore, as a draft which will be modified in due course to take account of the data contained in additional country studies.

### **A. The Infrastructure of the Research Environment**

The research environment is highly pluralistic in all western European countries. A wide range of institutions and organizations are engaged in research on adult education. In addition to the research undertaken by universities and other institutions for higher education, the country reports refer to research which is systematically carried out by a range of other organizations. These include:

**a - government organizations which collect demographic and other statistical data** relevant to adult education such as the Swiss Federal Statistical Office and the Social-Cultural Planning Bureau in the Netherlands;

**b - national research organizations** such as the Institut National de la Recherche Pédagogique in France and the National Institute for Economic and Social Research in the United Kingdom (U.K.);

**c - national advisory committees for adult education**, such as the Council for Adult Education in Finland;

**d - national, regional and local associations for adult education**, e.g. the National Institute for Adult Education in Norway and the Swiss Federation for Adult Education;

**e - research departments** of trade unions, employers' associations and individual business firms;

**f - commercial organizations** which undertake contract research.

The country studies do not provide a quantitative picture of the distribution of research among these different organizations. There do appear to be, however, significant variations between countries. It is clear that the university is not everywhere the major location for research on adult education. In Finland, for example, it is estimated that two-thirds of all research is based upon the universities, while in the Netherlands this may currently be as low as 20%. This report will concentrate upon the organization and development of this university-based research.

### **A-1. Channels for funding research**

When attention is focussed to the research undertaken within universities, the country studies indicate that there are four major channels for allocating financial resources to research:

#### **a) *The internal allocation mechanisms within the global budgets of universities***

These internal mechanisms allocate the structural funding received from government to self-determined priorities within the university. This may include funds for the appointment of teaching and research staff either in departments dedicated to adult education or in other academic departments which are engaged in this area of research. Despite the growing social and economic significance of adult education in all countries, this is not necessarily reflected in higher levels of internal funding for research activities in this area. The Finnish country report, for example, suggests that central funds have hardly increased at all in the last few years and that individual universities have reallocated funds to strengthen their dedicated departments of adult education, especially the funding of professorial chairs. The reverse pattern is found in the Netherlands where the number of dedicated departments for adult education has actually declined as a consequence of cuts in central funding and reallocation of funding within the universities. Research on adult education has not achieved a high profile within the universities in any of the western European countries and is very much the junior partner of the educational and social sciences in the university hierarchy.

**b) *The allocation of funding by national research councils***

Funding by these councils for scientific research is of greatest importance in most countries for the development of fundamental discipline-based research and the training of young researchers. These funds facilitate the appointment of full-time researchers, post-doctoral fellows and Ph.D studentships. There are few indications in the country reviews that researchers in the area of adult education have been highly successful in securing access to such funding. The exceptions are Germany and the Scandinavian countries. In most countries, research in the area of adult education is still generally regarded as the 'poor cousin' of the educational sciences and must compete, furthermore, with other disciplines in securing such funds.

**c) *Research funding from national, regional and local governments***

Most of the country studies refer to the salient role played by national government departments in the allocation of funding to research in adult education which is intended to support policy-making. In the Scandinavian countries in particular, the country studies refer to the strong tradition of research in support of governmental committees of inquiry in the field of adult education. On the other hand, this is far less significant in Greece, Italy, Portugal and Spain, where government intervention in relation to adult education is a relatively recent phenomena. The Ministry of Education at national level is paramount in most countries with the exception of those countries with a federal structure of government such as Belgium (the Wallonian and Flemish communities), Austria and Germany (the Lander), and Switzerland (the Cantons). In the United Kingdom there are separate funding councils for England, Northern Ireland, Scotland and Wales. Of major significance in most countries is the growing importance of the respective Ministries responsible for Labour, Social Affairs, Employment and Economic Development in the funding of research on adult education. The Norwegian, Swedish and United Kingdom country reports are the only ones to refer specifically to the importance of the Ministry of Defence as a source of funding. The United Kingdom report also makes reference to other government departments such as Internal Affairs, Overseas Development, and the Environment. Most countries also refer to regional and local governments as sources of research funding where these authorities have responsibilities for adult education, social-cultural activities and community development.

**d) *Research for adult education associations***

In many of the western European countries, there exist a large number of associations which represent the interests of organizations in the field of adult education. These may include national associations for the whole field of adult education, such as the National Institute for Adult Continuing Education in the United Kingdom, and associations for specific sectors of the adult education field, such as the folk high school associations in a number of countries. Some of these associations have their own staff members for the purposes of research, but they are also an important source of funding for research undertaken by university departments on their behalf.

**e) *Contract research for trade unions, employers and other social groups***

University-based researchers in a number of countries have a long tradition of research in support of trade unions and workers' education which has increasingly focused in recent years upon participation in collective decision-making and health and safety issues in the work environment. Of growing significance at present is the growing amount of contract research which is undertaken on behalf of employers' organizations and business concerns in the area of human resource development, career planning programmes and vocational training. In addition to research for the social partners, researchers in the area of adult education have also established extensive contacts with a diverse range of voluntary associations and social movements which may be the source of limited funding for research to support their own educational activities.

**f) *Funds granted by foundations***

In most countries there is a variety of public and private foundations which allocate funds for social science research. These include the national lottery foundations in a number of countries, research foundations established by banks, business concerns and trade unions, and diverse private foundations. Few if any of these foundations are specifically concerned with adult education. The country reports suggest that they are generally not well known to adult education researchers.

### **A-2. Allocation and assessment mechanisms**

The development of mechanisms for the allocation of research funds and the assessment of output is closely related to the existence of national research foundations and the degree of institutionalization of research. Where national research organizations exist, as in most of the northern European countries, research grants are allocated through public tendering and open competition for research funds within long-term research programmes. This requires that researchers have to submit research applications which are assessed by means of peer review in terms of the relevance of the research topic, the proposed methodology, and the publication record of the researcher. While this has been previously a case of the individual researcher submitting an application for funding, such applications are increasingly assessed not only in terms of the priorities in national research programmes, but also whether project applications are submitted by research teams with a coherent research programme. This development is associated with the tendency to create a limited number of recognized 'centres of excellence' which will receive priority in the allocation of research funds. Such a trend is highly developed in the Netherlands, where centres of excellence are recognized in the form of the establishment of graduate schools, but is also a significant feature of current trends in the United Kingdom. It is significant for the less institutionalized allocation systems in the southern European countries that mention is made of a less open system of competition and that the personal contacts and the reputation of the researcher are important factors in securing funding.

Traditional systems of assessing the quality of research output are being replaced in a number of countries by systems of external quality control and research assessment procedures. Such systems for external quality control have been introduced at a national level in the Netherlands, Sweden and the United Kingdom. These countries report the institutionalization of peer review in the form of the research assessment exercise in the United Kingdom, with a national ranking system of all departments, organized by the Higher Education Funding Councils for England, Wales and Ireland, and the external review committees in the Netherlands, organized by the Association of Dutch Universities, on the basis of a four-year cycle. Rather than relying upon citation analysis as a system of objective measurement, these exercises in the auditing of research output rely to a large extent upon quantitative measures of research publications. Finland, the Netherlands and Sweden are significant for the inclusion of foreign academics in their external committees for quality assessment of research efforts. Such systems of external research auditing and quality control are significantly absent in Germany.

Although the country report for Turkey remarks that the assessment process largely remains a formality, it also refers to arguments within the universities that citation analysis should be introduced as an instrument for assessing research output and approval of new research projects. Although citation analysis was employed, somewhat controversially, in order to assess the relative performance of universities in the 'new Lander' of the enlarged Federal Republic of Germany, the United Kingdom reports, on the other hand, that an exploratory study of leading British journals suggests that citation analysis was of limited value in the objective measurement of quality.

### **A-3. Fundamental and applied research**

Within the traditional systems of university-based research, the choice of research topics was largely left to the personal interests of individual academics and their success in securing some agency to support their work. In the main, this has tended to favour the development of a pluralistic research culture. Theoretical and fundamental research has been carried out alongside a heady mixture of practice-related research in co-operation with organizations in the field by way of action and participatory research. Where national scientific research councils are operational these tend, however, to give priority to fundamental disciplinary research which contributes to the development of the body of knowledge and the formulation

of theories in the major disciplines. The autonomous university-based research environment is increasingly challenged where governmental bodies, such as the national advisory boards and councils for adult education, have established research programmes in the field of adult education with specific priorities and have become significant in determining the allocation of research funding. Given the growing amount of contract research for third parties within the total research budget in most countries, the country reports indicate that there is a general move towards the predominance of applied research. In the Scandinavian countries this has led to an emphasis upon research and development activities in support of government policy and legislative measures, while the country study for France argues that publicly funded research, especially in the field of continuing professional education, is dominated by applied research with very functional objectives in line with the objectives of public policy and the business world. The Swiss report refers to the predominance of applied research and in particular indicates that increasing research funds for vocational training and continuing professional education will strengthen this trend. A similar priority for applied research is also reported for Austria, the Netherlands, Turkey and the United Kingdom.

#### **A-4. Priorities in public funding of research**

Given the relative autonomy of university-based research in the area of adult education, the research traditions in all the western European countries have been characterized by great diversity. The country reports are unanimous, however, in their identification of the key priorities in the current public funding of research. During the 1980s, it is clear that the priorities of public bodies have shifted significantly away from a relatively pluralistic approach to research on adult education towards an overwhelming concentration upon education and training in relation to employment. This is also reflected in the general trend towards greater support for applied research in this new priority area. Within this broad area of research on education and work, the country reports make it possible to identify a number of key themes in public funding policy.

##### **a) *Human resource management and professional development***

There can be little doubt that an increasingly important area of research is concerned with human resource management, career development programmes and the role of continuing education and training in human resource development. Particular emphasis here is placed upon the effectiveness of the provision of education and training in the promotion of continuing professional development for managers and professionals in organizations. An emergent theme in this area is research on the consequences for continuing professional education of the increased mobility of professionals within the European internal market.

##### **b) *Working-life and qualification research***

There is significant interest in the rapidly changing nature of working-life and the re-organization of production processes in the manufacturing industries, the service industries and public enterprises. This leads to an emphasis on research with regard to the qualifications needed by employees in order to enable them to operate effectively in reorganized and continuously changing work environments. Important here is the reconsideration of the relationships between general qualifications and specifically vocational qualifications in relation to work.

##### **c) *Accreditation of training and learning***

In most countries qualification research is closely related to efforts to establish more flexible systems for the accreditation of training and learning. This includes research on the reorganization of national systems of formal vocational education and the accreditation of vocational qualifications. Increasing emphasis is also placed upon the accreditation of informal learning which takes place both in and outside of the work-place. Research in this area is concerned with the accreditation of experiential learning and the establishment of systems for the accreditation of prior learning.

##### **d) *Learning in the workplace***

The reorganization of work has contributed to an increasing interest in the role of learning in the workplace within the total vocational training effort. Research here focusses upon flexible training systems which combine informal learning through work experience with more formal elements of training. In contrast to the emphasis in the past on vocational training off-the-job, increasing attention is now devoted to research with regard to the effectiveness of on-the-job training within the working environment. A particular focus for research and development activities involves the decentralization of the determination of training needs from staff departments to line managers.

**e) *Educational technologies and open learning***

More flexible approaches to vocational education and training have also contributed to a significant revival of interest in the use of new educational technologies. In addition to the more traditional utilization of printed materials, radio and television, research on multi-medial systems for education, training and instruction focusses increasingly upon the interactive potential of the personal computer, electronic information networks and communication systems such as E-mail in creating more flexible forms of open learning.

**f) *Access to the labour market***

Given that significant percentages of the adult populations in the European countries are excluded from the working force, a number of the country reports indicate the current priority given to research on improving access to the labour market. This research is largely focussed upon specific target categories such as the long-term unemployed, poorly qualified workers, women, older workers, and immigrants. Efforts to promote the social integration of relatively marginalized groups are increasingly focussed upon facilitating their access to the labour market. Research in this area focusses increasingly upon programmes which are intended to sensitize target groups to the labour-market and to provide them with adult basic education, guidance and counselling, vocational training and work experience. In the southern European countries, research on literacy and adult basic education continue to be important themes, but these are increasingly integrated with projects to encourage access to the labour market in regional economic and community development projects.

The country studies are in general agreement that these key areas will dominate publicly funded research on adult education in the western European countries during 1990s.

**A-5. *Systems for the inventarization of research***

The country reports suggest that there is an absence of comprehensive systems for the inventarization of the products of the research effort in bibliographical data-bases. Despite the long tradition of research activities in some countries, the increasing importance of adult education as an area of research, and the increasing availability of funding to this end, research output - in the form of research reports, publications and dissertations - is inadequately inventarized at the national level. As the country report for France makes most explicit, the very plural, diverse and complex nature of the entire field of adult education is in itself a major barrier to the creation and maintenance of coherent data-bases. The United Kingdom, likewise reports the current absence of a comprehensive inventory of research and the decline of a relatively effective system, managed by the National Institute for Adult Continuing Education, when funding was removed. A similar situation applied in the Netherlands following the demise of the Dutch Study-Centre for Adult Education. In addition to the diversity of the research area, the lack of funding for bibliographical data-bases is reported in a number of country studies as a major reason for the failure to establish, or maintain, adequate systems for the registration of research publications. Despite their significant tradition of research in the field of adult education, the Scandinavian countries also report the absence of adequate bibliographical data-bases. As is the case elsewhere, it would appear that university-based research in the form of dissertations is the best registered form of research, although this forms a small proportion of the total research effort. Reports of applied research, and in particular reports of research and development projects for specific social organizations are the least well reported forms of research.

As the Turkish national study reports, it is extremely difficult to utilize effectively even the existing bibliographical data-bases in a purposeful manner. The Swedish and Finnish country reports, in line with the Danish, Dutch, German and United Kingdom reports, not to mention the reports from the southern European countries, indicate the lack of comprehensive records of the research effort. Attempts to register research are characterised by either peak periods in the collection of national data or the efforts of particular organizations to collect data in specific areas of research. These limitations in the national registration of research is compounded, furthermore, by the fact that most systems for the registration of research are in the native language and that they are not available for consultation by the broader academic forum in the European countries. It is necessary to note important consequences of the inadequacies in the registration of research in general, together with the lack of accessibility of the national research literatures to researchers from other countries. As the French country report notes, it is necessary to deplore the lack of opportunities to utilize the research undertaken in this field and to make use of it to develop a more comprehensive body of knowledge about the object of study in its diverse forms.

## **B. Internal Organization of University-based Research**

Systems of higher education in the European Community have either a binary or unitary structure. The binary structure is characterized by the distinction between the work of universities and polytechnics (higher professional schools). One dimension of their different tasks is that research is largely regarded as the responsibility of universities. There is still a strong binary structure in the most European countries, and there is a tendency to restrengthen the binary divide in some countries such as the Netherlands. The Scandinavian countries encourage close co-operation between universities and teacher training colleges which train adult educators. A radical abolition of the binary divide has taken place only in the United Kingdom, where the polytechnics were transferred to the university sector in 1993.

### **B-1. University involvement in research**

For most countries, no precise data on the number of universities undertaking research was available to us given the qualitative nature of this phase of the research. Indications suggest that the number of dedicated departments, i.e. those with specialized teaching and research tasks in the area of adult education, may vary from as many as 30 (Germany and United Kingdom) to only one (Portugal). These dedicated departments will normally provide the organizational focus for research within their university. Even among the dedicated departments, however, significant variations in the amount of research activities are reported in the country studies, especially in terms of the numbers of full-time researchers. However, attention should not be restricted to the number of dedicated departments since in all countries research on adult education also takes place in other university departments. The country reports do suggest, however, that a distinction can be made between countries where:

- a) the majority of universities have dedicated departments with a research task: Austria, Belgium, Denmark, Germany, Sweden, Finland, United Kingdom, Ireland;
- b) service departments for continuing professional education (also) undertake research: France, Switzerland;
- c) there are few dedicated departments: Greece, Italy, Netherlands, Norway, Portugal, Spain, Turkey.

### **B-2. Location of research within the university environment**

The country reports indicate that there is a great deal of variation in the location of research on adult education in the university environment. These variations are related to differences in the national traditions for faculty structures, and the specific historical development of research in adult education. With regard to dedicated departments with a research commitment, the most general pattern is the location of these departments in close relationship to departments of education or pedagogy. These have, furthermore, traditionally been located within the faculties of psychology or behavioural sciences. This can be partly understood in relation to the historically close disciplinary identity of educational and pedagogical studies with psychology as a parent discipline in most countries. It is necessary, however, to refer to the specific

situation in the United Kingdom where an interest in adult education research developed in the departments of extra-mural studies which offered university-level courses to adults within their region from the 1920s. This extra-mural task was not developed to the same degree as an integral task of the universities in other European countries. It is also important to note the situation in Austria, Germany and the German-speaking cantons of Switzerland where an interest in adult education had a stronger basis in the faculties of philosophy. Although the first chairs in adult education were established as early as 1926 at the University of Nottingham (UK) and in 1929 at the Civic High School in Helsinki, the gradual development of research remained the prerogative of isolated individuals in departments of pedagogy and educational science until after the Second World War.

The establishment of dedicated departments became a somewhat more widely accepted development in the 1950s and 1960s, especially in Germany and the United Kingdom, and this has become a much more consistent pattern during the 1970s and 1980s. In Sweden, for example, the first Adult Seminar was established at the University of Stockholm, and this was followed at Malmö and Lund in the 1970s, and Linköping, Uppsala and Göteborg in the 1980s. A similar pattern can be observed in Finland where the departments at Helsinki (1965) and Tampere (1966) have since been followed by the universities of Jyväskylä, Lappeenranta and Joensuu in the 1980s. Germany has witnessed a rapid growth with dedicated departments (Fachbereich) created within the Institutes for Educational Sciences. A number of other countries have witnessed a rapid expansion in the number of dedicated departments in the 1980s. Following Vienna (1972), departments have been established in Austria at the universities of Graz, Innsbruck, Klagenfurt and Linz. Despite this pattern of expansion in the number of dedicated departments, this is not always reflected in the number of appointments to professorial chairs which could be regarded as the mark of full academic acceptance. With the exception of the Netherlands and the United Kingdom where a department is usually headed by a professor, the number of chairs in most countries is much lower than the number of departments. Sweden for example has long had a number of active dedicated departments but the only chair was established at Linköping as late as 1982.

An interesting feature in a number of countries, is the role played by service departments for continuing professional education. In France and the French-speaking cantons of Switzerland, these departments play a vital role in providing a basis for the development of research activities. Although France has more than 70 universities, the country report indicates that while very few have dedicated departments, each university is required to establish a service department for continuing professional education. Research undertaken by these service departments is attached to the appropriate faculties such as law, economics, sociology, medicine and engineering etc. Other country reports refer to the potential importance in the future of this particular sector of university-based research. Finland reports, for example, that the continuing education centres at the 20 Finnish universities have recently started to become involved in research mainly related to the evaluation and development of their own activities. The Swiss country report also argues that the expansion of federal and cantonal funds for the encouragement of continuing professional education will increasingly influence the development of research. A similar development can be registered in the United Kingdom where the dedicated departments increasingly combine their traditional extra-mural function with the provision of continuing professional education within often renamed Departments of Continuing Education.

The third pattern located in the country reports is the situation where there are few if any dedicated departments whether for general adult education or continuing professional education. Although the Netherlands were characterized in the 1970s by the creation of 7 dedicated departments for andragogy alongside pedagogy at the 13 universities, these had been reduced to only 3 by the end of the 1980s. It is of interest here, that the Netherlands is the only country to have established dedicated departments for andragogy. Furthermore, Dutch universities, with the exception of the Technical Universities at Delft and Eindhoven, do not have dedicated service departments for continuing professional education. While research takes place in Denmark at the universities of Aalborg, Copenhagen, Odense, Roskilde and the Royal Danish School of Educational Studies, only two, Roskilde and the Royal Danish School of Educational Studies have dedicated departments with a research responsibility. Norway also reports the marked absences of dedicated departments. Denmark, Norway and the Netherlands, all with a long tradition of institutionalized

adult education, have to be distinguished from those countries where this is not the case. The country reports for Greece, Italy, Portugal, Spain and Turkey all argue that the relative lack of research is related to the historical absence of institutionalized adult education in these countries. As a consequence, these countries report the existence of few dedicated departments in the area of adult education. It is significant, however, that the country reports for Portugal and Spain refer to the growing provision of continuing professional education as an important potential basis for a more widespread development of research related to adult learning. This will depend upon the future direction of development of service departments for continuing professional education which have traditionally not been associated with the educational sciences within the university environment.

In addition to these three major patterns for the organization of research within universities, all the country reports refer to relevant research which is undertaken by members of staff in other university departments. Frequent mention is made to Departments of Education (instructional technology), Sociology and Social Policy, Management and Business Administration (human resource development), Psychology (social psychology and psychology of work), Languages and Linguistics (language learning), Economics (labour market studies and the economics of education) and Theology (religious education and pastoral work). Furthermore, a small number of countries report the establishment by individual universities of multi-disciplinary institutes for social and economic research, which may also undertake research in adult education. These institutes are essentially concerned with the acquisition of short-term contract research for a number of university departments.

### **B-3. Dominant themes in research activities**

It is important to note immediately that there are significant differences between the research priorities identified by the research funding agencies, see A-4, and the priorities manifested by the research activities of universities. Given the increasing importance of external support for research, the themes in university-based research appear to be more diverse and pluralistic than one might at first expect. This suggests that researchers of adult education are not entirely dependent, as yet, upon the external determination of research activities. They are still able, in varying degrees, to make use of the available channels of funding, as identified in A-1 and A-2, in order to maintain an area of relative autonomy in decisions about their research. This degree of relative autonomy also means that it is not easy to identify the major themes within the total body of research within the universities. A general failure to establish adequate bibliographical data-bases in most countries - see A-7 - means that it is difficult to gain access to the body of completed and ongoing research. Nonetheless, the country studies have attempted to indicate the major areas of research in the universities.

As one might expect, there is a clear consensus that research in adult education is increasingly moving in the direction of education for the labour-market and the world of learning in the workplace. This is the increasingly dominant theme in research in all the western European countries, and the sub-themes of this research correspond closely to those identified in A-4. However, this is far from an adequate picture of the very rich and diverse body of research on adult education phenomena. Attention will be focussed here, therefore, on the major themes which the country reports have identified within the broader area of the total research effort in the western European universities. This will not comprise a report of the lists of research topics included in the country reports. An attempt will be made to identify a number of coherent areas of research activity which constitute the research programmes of the emerging area of systematic study of adult educational phenomena.

One of the major themes of research in adult education has been concerned with the *patterns of participation and non-participation in adult educational provision*. A great many survey studies have been carried out with regard to the socio-economic characteristics of the participants and non-participants in adult education programmes in general and more specific forms of provision such as folk high schools, study circles, social-cultural activities, evening and day-schools for adults, literacy projects etc., and, increasingly, vocational training programmes. Such studies have been complemented by research into the objective and subjective educational needs, and the educational motivations of different social categories. Research in this area has increasingly focussed upon the barriers to participation, the exclusion of socially



and educationally disadvantaged social categories, and the development of outreach and access strategies to remove barriers to participation. This kind of research has increasingly been directed to studies of specific target groups such as the long-term unemployed, women, and immigrants, and the facilitation of their entry into the labour market by way of educational programmes. During the last ten years there has been an increasing research involvement in adult education for older adults.

There is a significant body of research which focusses upon the *historical development of adult education* in its diverse institutional forms. Although historical studies of adult education institutions have been long-established in Germany and the United Kingdom, the country studies for Belgium, Denmark, Finland, the Netherlands and Sweden suggest that a growing interest in historical studies is related to the emergence of adult education as a new field of study and the corresponding need to recover the traditions of adult educational provision. On the one hand, this has contributed in a number of countries to major studies of folk high schools, study circles, university extension, lending libraries, popular education, folk (popular, workers') universities and workers' education. This research has been closely related to studies of the relationships between social movements and the role played by adult education in their struggles for emancipation, democracy, and social equality. Workers' education and the educational activities of trades unions have also been an important topic of research. Given the current interest in work-related education, there are indications of a growing interest in the historical development of vocational education and training. An important dimension of research on the history of adult education comprises systematic studies of cross-cultural influences in the historical development of adult education. Such research has focussed upon the reception and adaptation of the folk high schools and other forms of residential adult education, university extension, popular universities and workers' education in the European countries. The historical dimension has also been an important factor in the development of comparative research in adult education.

Research into the institutional forms of adult education has contributed to *descriptive studies and evaluation of forms of provision*. Such research has not been limited to work-related education and training. Contemporary forms of liberal, general and popular adult education continue to form a focal point for research in a number of countries. The major topics within this area include residential adult education, day folk high schools, social-cultural activities, folk universities, associations for popular enlightenment, arts education and recreational courses. Although these forms of adult education are confronted on a broad front with major reductions in public subsidies for their activities, they continue to attract large numbers of adults learners and for this reason alone they attract the continuing interest of researchers. In contemporary circumstances, it is also necessary to note the educational activities for adults which are organized by grass-roots community organizations and the new social movements such as the environmental, women's and gay movements. There is also a continuing interest in the educational activities of voluntary associations, which, together with social movements, are regarded as the contemporary contribution to education for democratic citizenship. At last, but not least, it is necessary to note the relative absence in the country studies, with the exception of Austria and the Netherlands, of references to research with regard to the provision of adult education for immigrants.

A further major area of research involves the study of issues which concern *teaching and learning processes in adult education*. This research theme has developed in relation to both institutionalized and more non-formal forms of adult education, but it is obviously of increasing importance in relation to learning in the workplace. On the one hand, there is an emphasis upon curriculum planning and instructional technology, while, on the other hand, increasing attention is paid to forms of self-directed learning and the learning strategies of adults. The patterns of interaction between educational resources and adult learners constitute the focal point of this research theme. Variations in the educational environment and the life experience of adult learners are of increasing importance in research. Research in this area may range from the programme planning of long-term residential courses in folk high schools and formal adult education, through nonformal learning in community settings and social movements, to vocational training and learning in the workplace. A particularly important sub-theme here is the relationship between knowledge, learning and experience which is related to the growing interest in experiential learning and the accreditation of prior learning. In terms of the media component in instructional systems and learning

processes, the emphasis in research is increasingly placed upon open learning systems and the role of the media in adult learning. It remains significant, however, that only three country reports, Denmark, the Netherlands and Sweden, refer specifically to the qualifications and training of the teachers of adults as research topics in the teaching/learning interaction.

#### **B-4. Disciplinary basis of research**

The international literature in the area of adult education has long been characterized by a continuing debate as to whether 'adult education' is a field of social practice or a specific discipline in its own right. For the western European countries, the current country reports suggest that the dominant perspective is one in which adult education is regarded as a very diverse field of social practices which is worthy of serious and rigorous scientific study. There are few indications to suggest that adult education is regarded as an independent scientific discipline with its own theories and methods which distinguish it from the other social sciences. In the western European countries, it is highly significant that, with the exception of the Netherlands during the 1970s and 1980s, there have been no efforts to establish 'andragogy' as an integrative study of adult education. Indeed, there are adequate grounds provided in the country reports to conclude that the study of adult education is widely regarded as a transdisciplinary area of scientific activity which justifies the existence of dedicated departments to this end.

This transdisciplinary area of study draws in varying degrees upon the more fundamental mono-disciplines for its theoretical perspectives and research methodologies. While psychology and philosophy have traditionally provided the major disciplinary roots for the study of education - and pedagogy - in the European countries, there is clear evidence that the current situation with regard to relevant disciplines is far more pluralistic. In the country reports, the most frequently mentioned mono-disciplines include psychology, sociology, philosophy, political science, history and, in recent years, cultural and media studies. A number of country reports indicate that the dominance of psychology has in particular been challenged since the 1970s by the emergence of a sociological orientation which places greater emphasis upon the social structural determinants of adult educational phenomena. It is significant, however, that the relevance of economics to adult education research is reported as an underdeveloped area in a number of countries which will become increasingly important. Given the increasing importance of the relationships between adult education and the world of work, there are also indications that research in adult education must also seek closer relations with other transdisciplinary areas of study such management studies and the organizational sciences. The significance of women's studies as a relevant transdisciplinary area is also noted.

An interesting dimension of the disciplinary problematic is identified in the country report from France which argues that non-university organizations still tend to look to the mono-disciplines as the source of relevant knowledge. This can also be an intra-university problematic where the case for dedicated departments of adult education is still not accepted by the dominant foundation mono-disciplines or the educational sciences. As such, much work still has to be done in some countries to establish dedicated departments of adult education which focus upon the transdisciplinary research of adult educational phenomena. This suggests that priority must be given to working out the transdisciplinary nature of research on the basis of rigorous research with a sound disciplinary basis which is recognized as 'real' research. The scientific study of adult education cannot resort to arguments that is a 'special case' which should be judged by its own criteria. Expansion of external quality assessment of research output could prove to be a conservative factor which enforces the criteria of the traditional mono-disciplines in judging research on adult education. The current emphasis in research upon qualitative methods could also prove to be a disadvantage. This challenge has to be met with high quality research. As a number of country reports suggest, the transition from transdisciplinary studies of adult education towards interdisciplinary research is a task for the future.

#### **B-5. Balance between quantitative and qualitative research**

It would be misleading to view quantitative and qualitative research as the polarities in the repertoire of research methods available to the researcher. Indeed, the country reports indicate that research in adult education is characterized by a pluralistic approach in which both quantitative and qualitative

methodologies are employed. As the Finnish country report argues, quantitative, qualitative and action research should not be placed in an order of priority since they all serve their own purposes. It remains the case, however, that the dominant research paradigms associated with the foundation disciplines of adult education research are predominantly positivist and quantitative in terms of their methods for the collection of data. The tradition of participation research in adult education during the 1960s and 1970s was in the main dominated by survey research among large research populations with the use of questionnaires. A number of longitudinal studies have also employed quantitative methods. Much short-term policy-related contract research is also largely quantitative in approach.

Nonetheless, the country reports provide convincing evidence of an increasing interest in qualitative methods among adult education researchers since the 1970s. The country report from France concludes that 'recherche-action' is now dominant in the area of adult education and that there are now few large-scale quantitative methods. On the one hand, this was stimulated by a growing interest in action research and participatory research in the field of adult education practice, and, on the other hand, a new emphasis upon the qualitative research methods in the founding disciplines. The hermeneutic tradition of interpretative research, neo-Marxist critical theory, phenomenology, ethnomethodology and the emergence of cultural studies contributed to this development. The country reports for the Netherlands, Sweden and the United Kingdom also refer to the influence of feminist scholarship and women's studies upon the growing interest in qualitative research methods. In a number of countries, the growing interest of researchers in biographical and life-history research is reported as an increasingly important area of research where qualitative methods are widely employed.

Taken as a whole, the country reports do justify the conclusion, however, that university-based research on adult education in the western European countries is currently characterized by an emphasis upon qualitative rather than quantitative methodologies.

#### **B-6. Dissemination of results of research**

In addition to the presentation of papers at scientific meetings, the publication of the results of research constitutes the major channel for the dissemination of research at the national and European levels. This takes place mainly through the published proceedings of scientific meetings, dissertations, articles in journals and yearbooks, edited books or monographs. Given the development of external assessment of research in many countries, publications constitute an increasingly vital component in the quantification of research output.

Most countries report the existence of journals for the dissemination of research results. The number of such journals is clearly related to the degree of institutionalization of research activities and the size of the research community. These journals include those dedicated to adult education and those in related disciplinary fields such as educational sciences, psychology, sociology, history, industrial relations and labour market, cultural and media studies and management studies etc. The country reports indicate that the largest numbers of dedicated journals are to be found in Denmark, Finland, France, Germany, United Kingdom. Brief reports of research are also regularly placed in field-related journals which are intended for practitioners. Reports of much practice-related research are generally disseminated on a more informal basis in small numbers in what is known as the 'grey circuit' of non-official publications. With the sharpening of the criteria employed in the measurement of research output, publications in field-related journals and the grey circuit carry increasingly less weight.

In the case of conference proceedings and dissertations, these are generally disseminated in the series published by scientific societies, adult education associations and individual universities. Very few such publications are commercially viable and rarely appear in the collections of commercial publishers. In most countries, the research community in the area of adult education is too small to support a market for series of commercial publications. The one exception is Germany where a number of commercial publishers produce series of monographs and edited volumes. In most other countries, monographs and edited volumes are published within more general series produced by commercial publishers in the educational sciences and related fields.

At the European level, there are few publishing outlets for research in adult education. Significant is the absence of a dedicated European journal, with the exception of *European Journal for Higher Education*. Some country studies report, however, that researchers have been successful in placing articles in English-language scientific journals such as *Adult Education Quarterly*, *Studies in the Education of Adults*, *International Journal of Life-long Education*, and *International Journal of University Adult Education*. Mention is also made of the occasional publication of articles in non-dedicated journals in related disciplinary areas. There is also the *International Yearbook of Adult Education* which has a largely European, but predominantly German, orientation. All the Scandinavian countries report the importance of the annual English-language publication *Adult Education Research in the Nordic Countries*, which is a record of the presentations at the annual Nordic conference of researchers in Scandinavia. A recent initiative is the *European Handbook of Continuing Education* which is a commercial publication in co-operation with the European Society for Research on the Education of Adults (ESREA). The papers presented at the ESREA European research seminars are also published on an occasional basis. A series of monographs has also been established by the European Association for the Education of Adults (EAEA) but this is not a research-based series as such.

### **B-7. Language of dissemination**

There can be little doubt that the development of a national scientific forum in the area of adult education is facilitated by the dissemination of the results of research. At the national level, the choice of language is generally unproblematic with the exception of those countries where there are contemporary struggles about languages, as is the case in Spain and Wales, or where more than one language is used as in Belgium, Finland and Switzerland. The majority of the country reports indicate that the dissemination of research takes place overwhelmingly in the language(s) of the country concerned. The one major exception to this general rule is the Netherlands. Dutch researchers are increasingly encouraged to publish in English-language publications which systematically earn higher scores in the quantification of research output. At the other extreme is France, where recent legislation has given added protection to the French-language in communication within the scientific forum.

The creation of a scientific forum at the European level, however, is predicated upon the facility to actively or passively make use of other languages for the purpose of disseminating research. In the current situation, there are three major languages - English, French and German - which still tend to dominate communication among the European forum. This contributes in effect to three relatively closed and self-sufficient language-based forums in the area of adult education. The use of other languages, particularly, Italian and Spanish, is very rare and is usually associated with the individual biography and interests of the researcher. It is significant, furthermore, that the country reports for France, Germany and the United Kingdom indicate that it is very rare for their nationals to publish in languages other than their own. Other countries indicate that the translation of research reports into English, French and German are vital to any degree of successful participation in the larger European forum. As will be discussed later, the costs of translation facilities are very high and only limited funds are made available for this purpose.

When we examine the trends indicated in the country reports, it would appear that English is increasingly the major language adopted for the dissemination of research at the European level. The prevailing trend in this direction in the Netherlands has already been noted. Turkey also reports the increasing use of English-language abstracts and that dissertations at the University of Bogazici have to be submitted in English. Researchers in the Scandinavian countries also increasingly make use of English in publishing their research in both national and international publications. Finland reports that it is apparently the only non-English-speaking country to publish an English-language publication on a regular basis. Since 1991 the major yearbook of research in the Nordic countries has appeared in the English language. Austria reports the increasing use of English in addition to German as does Switzerland, which also refers to French. Portugal makes reference of translation into English, French and Spanish. France refers only to English for the purpose of abstracts. We shall return to the problem of learning foreign languages in the section D.

### **C. Continuing Professional Development of Researchers**

A significant feature of adult education research in recent years has been the growing interest in human resource management and in particular continuing professional development. One of the traditional characteristics of a profession has always been that potential members have to complete a clearly specified training in order to master the appropriate knowledge and skills. Following initiation into a profession, members are expected to keep their professional knowledge and skills up-to-date. This continuing professional development can be achieved by way of advanced education and training, attending conferences and seminars, and reading the professional literature etc. In this sense, entry to and continued recognition by the scientific forum as a researcher, in adult education or any other field of scientific activity, is a form of continuing professional development. This section will examine, therefore, the current situation with regard to the post-graduate training of young researchers, the organization of continuing professional development for qualified researchers and the availability of appropriate resources to this end.

#### **C-1. Organization of post-graduate training**

At most western European universities, the training of post-graduate researchers by way of preparing a dissertation is one of the jealously guarded prerogatives of the holders of professorial chairs. With the exception of Finland, Germany, the Netherlands and the United Kingdom, there are few chairs of adult education in dedicated departments. Post-graduate research training programmes dedicated to adult education have been established in the above mentioned countries, together with Roskilde in Denmark and Linköping in Sweden. This means that the majority of post-graduate research students continue to prepare their dissertations and receive their doctorates in the educational sciences or in related subject areas such as psychology, sociology, political science, management and organizational studies etc. Few researchers possess a post-graduate qualification in adult education as such. Whether dedicated to adult education or not, most programmes for post-graduate research training involve compulsory course components devoted to theoretical perspectives, research methodologies, statistical methods, information science and scientific reporting. With the exception of the Netherlands, foreign language training is not a compulsory element in research training programmes.

Three categories of post-graduate research training and funding mechanisms can be distinguished as follows:

- a) post-doctoral researchers who are preparing their 'habilitation' (Germany and the Scandinavian countries) as scientific assistants, post-doctoral research fellows financed by scientific research councils, and researchers employed in short-term contract research;
- b) full-time research students registered for the Masters and Ph.D degrees. These are variously funded by the universities themselves, studentships granted by scientific research councils and research students employed in contract research.
- c) part-time research students who are employed full-time in the field of adult education.

Quantitative indicators were not always available in the country reports, but the largest numbers of research students appear to be part-time and employed in adult education. The United Kingdom reported 300 research students registered for part-time study for the Masters and Ph.D degrees, while Finland reported 60 mostly part-time students at the universities of Helsinki and Tampere. At the other extreme, Portugal reported, and this may be the case in the southern European countries, there are very few dissertations in the area of adult education and that those were mostly completed at foreign universities.

#### **C-2. Registration of dissertations**

In line with the widely reported absence in most countries of comprehensive systems for the bibliographical registration of research in adult education, there are significant variations in the registration of doctoral dissertations. In most countries, with the exception of Ireland, Turkey and the United Kingdom, Ph.D dissertations are generally published in limited numbers in the series of research publications produced by universities themselves. With the exception of Germany, few dissertations are published by commercial

publishers. Systematic registration of dissertations at the national level is reported only in Finland, Germany, the Netherlands, and Sweden.

### **C-3. Continuing professional development of researchers**

Although adult education researchers are often involved in research on the continuing professional education of other professions, the appraisal and continuing professional development of university researchers is not well developed. This is a general feature of the universities throughout western Europe. Universities are not in general managed as organizations which devote explicit attention to the systematic management of their human resources, career planning and continuing professional education. Few universities have systems for the annual appraisal of individual members of staff and explicit performance norms such as the number of publications to be achieved, both of which are reported for the Netherlands. Career planning programmes are not always operational even in cases of substantial cuts in funding which demand the dismissal of staff, transfers, retraining or early retirement. There are, however, developments in this area which are related to the introduction of external quality assessment mechanisms in the area of research, although these tend to operate as negative sanctions rather than as positive systems to improve individual quality by way of continuing professional development.

### **C-4. National organizations for research**

An important indicator of the development and maturity of a scientific forum in any area of research is the existence of national, regional and local organizations which facilitate communication among the members of the forum by way of conferences and publications. These are in themselves regarded as important ways for researchers to pursue their own continuing development as professionals. The country reports indicate a wide variety of these organizational forms among researchers which include:

a) **national scientific organizations** of researchers, such the British Educational Research Association, the adult education sections of the German and Portuguese societies for educational research, the Adult Education Research Society in Finland; and the Swiss Society for Research in Education;

b) **national organizations in the general area of adult education** which are also hold regular meetings of researchers, for example the Grupo 90 in Spain, the Universities Council for Adult Continuing Education, the Standing Conference for University Teaching and Research in the Education of Adults in the United Kingdom;

c) **national networks in specific areas of research**, such as the Society for Research and Development in Popular Education in Denmark, the Congress for Current Research on Education and Training in France, the Research Network for Adult Basic Education in the Netherlands, and the 'Mimer' network in Sweden which is concerned with popular adult education in folk high schools, study circles and self-directed learning, and the Association for Educational Gerontology and the Society for Research on Higher Education in the United Kingdom.

Specific mention must be made of the regional organizations of researchers in the Scandinavian countries. These include the informal association of adult education researchers in the Nordic countries and the Nordic Association for Educational Research.

### **C-5. Conferences, seminars and workshops**

The above-mentioned organizations of researchers in the area of adult education are responsible for regular meetings of members of the scientific forum usually on an annual basis. In general, these meetings are regarded as vital components in developing the identity of the forum and promoting its intellectual coherence. As the Portuguese report mentions, the meetings of researchers on a regular basis can be a valuable centre for reflection because they bring together researchers with different backgrounds. The encouragement of these meetings of researchers could play a vital role in creating a sense of identity among the potential forum in the southern European countries where individualism and isolation appear to characterize the incoherent research community. The country reports also refer, moreover, to a wider range of other meetings devoted to research which are organized by other institutions such as the responsible ministries, regional and local authorities, scientific research councils, national advisory councils for adult

education, associations for adult education and the social partners. Such meetings are often concerned with the dissemination of applied research and are attended by representatives of policy-making bodies and relevant organizations in the field in addition to researchers. It is virtually impossible to provide here both a concise and representative statement of the vast variety of such meetings concerned with research in the area of adult education. The country reports do indicate, however, that adult education research is clearly an area of activity which gives rise to a great deal of investment of manpower and time in attending diverse conferences, seminars and workshops. They also suggest, furthermore, that this vast range of activity is poorly inventorized on a systematic basis and that it is both inadequately disseminated to and utilized by the research forum in the development of the body of knowledge.

The country reports indicate that researchers in general have limited financial resources to enable them to attend research meetings although the situation seems to be more favourable in the Scandinavian countries. Within the universities funds are usually limited by the annual budget with fixed norms for individuals depending on their status. Additional funding can be derived occasionally from budgets for contract research, applications to funding councils, and foundations. Such funds are also limited and subject to severe competition.

#### **C-6. Bibliographical resources**

Despite the rapid advance of computerized data-bases both nationally and internationally, it has been noted above on a number of occasions that research in adult education is on the whole inadequately and unsystematically inventorized in the form of bibliographical data-bases. The reasons for this are variously reported as the great diversity of this area of research and the fact that much research in adult education is often catalogued in relation to other social scientific disciplines. Furthermore, there is a vast amount of semi-public research publications in the whole area of adult education which the French report refers to as the problem of 'grey literature'. It is not only difficult to trace relevant resources but that these are often un retrievable because they are not always available in the collections held by university libraries. The situation seems to be much better in the Scandinavian countries where great efforts have been made to establish national bases in Denmark, Finland and Sweden, which document and disseminate information about publications on adult education. These countries, especially Finland, also report the existence of specialist libraries for the educational sciences and substantial collections in the area of adult education which have been built up over a long period of time. Elsewhere the position is less beneficial, particularly in the southern European countries.

In section B-6 above, attention was devoted to the major channels for the dissemination of research in the area of adult education. These included a rich and diverse literature in the form of the reports of conference proceedings, journals and books. Limitations on library budgets does not mean, however, that this very extensive literature on adult education research is readily available to the research community. This is the case with reference to the availability of national and particularly the international scientific journals. Once again, one has to recognize the very substantial differences between countries. At one extreme, the country report for Finland registers that the major universities have available a fairly comprehensive collection of the most important European and American journals and the latest literature in this field and that there is also literature from many other countries, such as Australia, India, many African countries, New Zealand. etc. At the other extreme, the report for France concludes that foreign and international journals are very few and that these are very difficult to locate. The latter would also seem to be the prevailing situation in the southern European countries where the limited number of publications in the national language are available but there is an absence of foreign publications. In most of the other western European countries, publications in the national language are readily available together with a reasonable supply of foreign-language journals, especially in English and to lesser degree French and German.

#### **D. European Research Activities**

Within the frame of this paper, attention will be devoted to the patterns of co-operation between researchers in the western European countries and their contacts with colleagues in the ex-socialist

countries. It should be pointed out, however, that some of the country reports indicate that co-operation in Europe should not take place at the expense of membership of the world community. The reports from Scandinavia and the United Kingdom, for example, refer to the continuing importance of strong links with the developing countries in the field of adult education. The Netherlands, Sweden and the United Kingdom also refer to renewed contacts with universities in South Africa. Portugal and Spain continue to place great emphasis upon contacts with the Latin American countries. A small number of universities also have contacts with China and Japan.

#### **D-1. Forms of co-operation in Western Europe**

The country reports provide evidence of extensive and diverse forms of bilateral and multilateral forms of co-operation between national organizations, universities and individual researchers in the area of adult education research. Although the reports suggest that most of these initiatives are the product of contacts between individual researchers with common interests, it is possible to distinguish between systematic forms of co-operation as follows:

##### **a) *Programmes initiated by the European Union***

A large number of country reports indicate that researchers at universities in their countries are involved in research-related activities in European programmes which include ERASMUS, COMMETT, FORCE, PETRA, INTERREG, the European Social Fund and the European Regional Fund. Many of these activities involve research and development activities in the context of regional development programmes and vocational training, while cross-border co-operation in the Euroregions is of growing importance. On the other hand, the country reports suggest that these schemes are not always well known and that applications for funding are widely regarded as very time-consuming procedures. The two ERASMUS programmes in the area of adult education are reported to have been of great significance in stimulating the mobility of both staff and students at the European universities, while work has also been undertaken in the area of co-operative curriculum development. One of these projects, known as **Studies in European Adult Education** includes the universities of Bradford, Bremen, Florence, Frankfurt, Galway, Glasgow, Graz, Leeds, Leiden, Maynooth, Nantes, Patras, Roskilde, Rethymon, Sevilla, Swansea, Thessaloniki, Ulster, Valladolid. There are applications for membership from Queen's University of Belfast and Tampere. Successful participation in this programme can lead to the granting of a European Diploma in Adult Education. The other project involves the universities of Aachen, Barcelona, Leuven, Nijmegen and Surrey.

Limited funds are available for the training of young researchers, but the European summer school for Ph.D students, which is organized by the ERASMUS programme **Studies in European Adult Education**, is of potentially great importance in this area. Candidates for membership of the European Union in the European Economic Area, Austria, Finland, Norway and Sweden, participate increasingly in these programmes.

##### **b) *Specific projects supported by the European Union***

A number of developments point to a limited but increasing commitment of the European Union to research activities in the area of adult education which will constitute an implementation of the appropriate articles in the Maastricht Agreement. CEDEFOP is an example of long-term support from the European Union in the area of vocational education. The Task Force on Human Resources, Education and Youth is currently co-financing a European-wide Delphi project on the Future of Adult Education in Europe, while it is also currently negotiating a programme with the European Association for the Education of Adults (EAEA) which includes some limited research-related activities.

##### **c) *Other inter-governmental organizations***

Country studies refer to diverse examples of participation in research-related activities associated with inter-governmental organizations such as UNESCO, OECD, UNICEF, UNDP and the Council of Europe. More specifically, it is necessary to note co-operation in the Scandinavian region which is stimulated by the Nordic Council of Ministers and national governments within this region.



**d) *Non-governmental European research organizations***

The country reports indicate participation of university-based researchers in a variety of autonomous multilateral European organizations which are relevant to research in the area of adult education. Among others, reference is made to the **European Association for Research on Learning and Instruction (EARLI)**, which has a section on adult learning, the **European Association of Research and Development Institutes (EARDI)**, the **European Universities Continuing Education Network (EUCEN)** and **CIDREE**. Most frequently mentioned in the country reports is the **European Society for Research on the Education of Adults (ESREA)**. The country reports suggest that ESREA has created new opportunities for researchers throughout Europe to actively participate in meaningful and fruitful forms of co-operative activity. In addition to the creation of specialist European research networks, ESREA also organizes an annual European research meeting on Social Change and Adult Education, and it will organize a European research conference in Austria in 1995. ESREA is also active in stimulating co-operation in the field of research publications. To this end, it co-operates closely with **Studies in the Education of Adults** by nominating members of the editorial board, and its members have been closely involved in the new **European Handbook of Continuing Education**. ESREA co-operates with other international organizations such as EUCEN, EAEA and UNESCO, and it also works closely with adult education associations and organizations of researchers at the national level.

The Scandinavian country reports all refer to strong tradition of Nordic co-operation in the area of adult education. Of importance here is the Nordens Folkliga Akademi in Gothenburg and the annual meeting of researchers in the Nordic region.

**e) *Specialist European research networks***

ESREA has concentrated upon the creation of European research networks which link researchers engaged in specific areas of scientific research into adult educational phenomena. The **ESREA European Research Networks** currently include networks devoted to: life-history and biographical research; adult education and active democratic citizenship; cross-cultural influences in the history of adult education; the labour market and adult education; adult education in relation to xenophobia, racism and ethnicity; adult literacy and numeracy; adult education and social change, education and the older adult; continuing professional development; adult education in cross-border co-operation.

As is demonstrated by the numbers of participants attending the annual research seminars organized by these research networks, the ESREA initiative meets the need of researchers in many countries to co-operate in research activities at the European level. The country reports also refer to a small number of other specialist research networks. These include the international network on the history of adult education, the Adult Education and the Arts network, the **European Residential Colleges Network**, the adult education sections of the **European Comparative Education Society** and the **World Comparative Education Society**.

**D-2. *Forms of co-operation with other European countries***

The country reports indicate an expanding range of co-operation with other European countries including the Baltic countries and central and eastern Europe. Very few of these forms of co-operation are institutionalized and most depend upon contacts between university departments and individual researchers. A small number of universities are reported to have participated in a limited number of adult education projects within the TEMPUS and PHARE programmes of the European Union. ESREA is also an important link to colleagues in the ex-socialist countries. Universities in Czechia, Poland and Slovenia have already hosted seminars of the ESREA research networks and many researchers from the ex-socialist countries participate in the activities of ESREA. The Scandinavian countries refer in particular to new forms of co-operation with the Baltic countries. Finland also reports co-operation with other Finno-Ugric peoples and the Hungarian-Finnish conference on Adult Education.

**D-3. *Financial support for co-operative activities***

The country reports indicate that limited funding is available to finance participation in co-operative research activities. Of particular importance are the above-mentioned programmes of the European Union although these are not specifically devoted to support for research activities. There is no specific funding line for research on adult education within the budget of the European Union, although the European Parliament has recently decided to support a budget line of one million ECU's for adult education organizations. The Task Force has allocated limited funding for the EAEA programme of studies and the Delphi-project on the Future of Adult Education in Europe. ESREA has not yet applied for European funding, but the ESREA research network seminars are proving increasingly able to secure financial support from ministries in a number of countries, in particular to support the participation of colleagues from the ex-socialist countries. Most countries report the limited availability of funding for multilateral and bilateral activities from government departments, research councils and the adult education associations. In order to fund visits and attendance at conferences, seminars and workshops, individual researchers are dependent to a large degree on grants from national research councils, foundations, research budgets, and internal university funds. It remains nonetheless very difficult to secure funding on a regular basis, although the situation is better in the northern European countries.

Opportunities to participate in European activities are seriously limited, furthermore, by the problems of translation and the varied ability of researchers to use foreign languages. Most of the country reports indicate that only very limited funds, if any, are available to facilitate translation of research reports into other languages. Given current trends within the scientific forum, this means translation into English. The country reports also indicate, furthermore, that very restricted funding is available to support the systematic learning of foreign languages by researchers. Some universities do provide language courses at reduced rates for members of staff but this is largely left to the initiative of the individual researcher.

### **E. Developments and Trends**

The authors of the country reports were requested to indicate the major developments and trends during the past five years with a view towards the future. An attempt will be made here to provide a brief synthesis of this section of the respective country reports.

1. It is overwhelmingly clear that the relationships between adult education and the world of work increasingly dominate the research agenda throughout Europe. This is expressed in the priority given to research on:  
changes in working life and production processes; studies of competencies, qualifications and accreditation; vocational preparation and continuing (professional) education; learning in the work-place and the training strategies of business; relationships between trade unions and employers; policy studies on education and training; influences of mobility within the European internal labour market on training.
2. Given that large numbers of adults in most European countries are not actively engaged in the labour market, a second major development is the increasing emphasis upon the role of adult education in facilitating access to the labour market. As a development of the traditional concern of researchers with the problems of social barriers to participation in adult education, the priorities here involve research on:  
the educational needs of disadvantaged social groups such as low-qualified workers, younger adults, re-entering women, the long-term unemployed, older workers and ethnic minorities; educational and vocational guidance and counselling; impact of special measures to encourage participation by specific target groups in education and training programmes; questions of access and links between different forms of post-school education and training; education and training within regional community development programmes.
3. A third priority area is related to the development and application of new educational and information technologies. The emphasis here is placed upon:  
further development of traditional forms of distance education, including satellite television; the application of interactive electronic media in education, training and

- instruction; multi-media systems; the development of open learning systems; self-directed and independent learning.
4. An increasingly influential area of development in both theory and empirical research concerns the location of learning within the total adult life-course. Priorities here focus upon:  
adult learning in relation to different phases in the life-course; study of the multiple 'careers' of adults in other areas of social life beyond the work place; the interaction between work careers and other social careers; the breakdown of 'standard biographies' in relation to gender, ethnicity and age; life events and transitions in the life-course as triggers to the involvement of adults in learning processes; life-history and biographical research.
  5. Despite the priority given to adult education and work, especially in publicly funded research, university-based research also manages to maintain a healthy interest in general and popular adult education. Priorities here include the social purpose and the emancipatory potential of adult education with regard to:  
day/evening schools for adults and popular universities; residential adult education and (day) folk high schools; study circles; social-cultural animation and community education; the educational activities of voluntary associations and (new) social movements; the forming of public opinion and active democratic citizenship; workers' and women's education.
  6. With regard to the 'everyday practice' of university-based research on adult education, the following developments and trends have been identified in the western European country reports:  
a general trend towards more short-term applied research in publicly-funded research; the close relationship between research and development activities in policy-related research; an emphasis upon action and participatory research in relation to adult educational practice; an increasing engagement with qualitative rather than quantitative research methods; a movement away from a psychological orientation towards a more sociological perspective; the development of more rigorous disciplinary-based research which can provide the basis for interdisciplinary research.

In conclusion, it is possible to locate a number of key issues which relate to contradictions in the relationships between theory and practice in research on adult education in the western European countries.

On the one hand, the relatively rapid expansion of dedicated university departments for adult education in the 1970s and 1980s has contributed, in the words of the Swedish country report, to its intellectual and social institutionalization as a transdisciplinary area of scientific study. In other words, the study and research of adult education phenomena is an increasingly coherent and legitimate area of scientific work in the universities. As the current 'state of the art' study suggests, however, there are important differences in this respect between the northern and southern European countries. The northern European countries in general have an increasing number of dedicated departments in the area of adult education and research in this area. These departments are involved to an increasing degree in theoretical reflection, possess the capacity to engage in disciplinary-oriented fundamental research, and are actively involved in the development of a range of research methodologies. This is far less the case of the southern European countries where much has still to be achieved in establishing the study and research of adult education within the universities.

On the other hand, research on adult education is still troubled by its problematic relation with the fields of practice and policy. Much applied research remains predominantly a-theoretical in its approach, while many research and development activities in support of policy measures are problematic in that they do not necessarily contribute to the long-term development of empirical data, the body of knowledge and theoretical work. Much practice-related research, especially action and participatory research, has been informed by a more critical understanding of the relations between theory and practice and the

methodological problems of such research. This theoretical and methodological understanding of practice-related research is not always shared by practitioners in the field.

These tensions between fundamental, policy- and practice related research will continue to feature in the western European countries in the near future. Tendencies towards more fundamental and disciplinary-based research within the universities are increasingly countered by the emphasis on short-term applied research with a policy reference. The field of adult education practice, especially the participants in adult education, could benefit in the long term from a firmer foundation for theoretical reflection and empirical research. The pressure from the current funders of research makes it unlikely that this will happen in the near future. Given the massive investments of governments in adult education and their desire for efficiency and quality in the provision of education and training, this is a most shortsighted approach.

## **F. Recommendations**

Public and private investments in adult education, especially in adult education related to the world of work, continue to increase in the western European countries. In the Netherlands, for example, the per annum investment in adult education by the public sector, the private business sector and individual participants now amounts to at least 5 billion ECU's per year. When this is extrapolated to the existing member states of the European Union, the potential investment in all forms of adult education exceeds 100 billion ECU's per annum, excluding the funds increasingly made available in European Union programmes. There can be little doubt that such a high level of investment should be effectively monitored by appropriate forms of research with regard to the efficiency and quality of provision. But it is also necessary to ensure that the research capabilities in the member countries and of the European Union itself have achieved the appropriate infrastructure. This will continue to involve the research undertaken by universities. Measures to this end could involve the following:

At the **national level**, government measures should include:

- a) the allocation of ear-marked funding for research on adult education by national research councils and advisory councils;
- b) encouraging the establishment of dedicated departments, perhaps as 'centres of excellence', which are committed to transdisciplinary research on adult education;
- c) supporting the respective national research societies in the area of adult education, and encouraging their creation where these do not as yet exist;
- d) establishing coherent systems for the external assessment by 'peer review of the research effort';
- e) recognition of appropriate programmes for the training of post-graduate researchers and the continuing education of experienced researchers;
- f) stimulate specialist research networks which organize regular seminars for the purposes of dissemination;
- g) promote the active participation of researchers in research meetings both nationally and at the international level;
- h) in order to promote participation in international, especially European, activities, researchers must have access to funding for translation and the acquisition of foreign languages;
- i) facilitating the creation of data-bases for the systematic registration of research activities.

At the level of the **European Union**, measures should include:

- j) the creation of a specific budget line for research on adult education in all its forms such as vocational and continuing education, general and popular adult education. At a level of 1% of the total investment in adult education and training within the member states of the European Union, this would create a dedicated research and development budget in the order of 1 billion ECU's per year. This budget line should include earmarked funds (70%) for priority areas designated by the Commission, but it should also include a significant measure of open funding (30%) for independent initiatives from European research

- organizations. The budget line must be open to competitive tendering from organizations and research networks with members in a number of countries.
- k) ESREA and EUCEN should receive priority among the numerous organizations which would qualify for open funding within the budget line for research. ESREA and EUCEN already co-operate closely in stimulating research on continuing education. In broader area of adult education research, priority should be given to ESREA which represents the university-based research forum and contributes to European co-operation through its extensive research networks, European research meetings and publications. EAEA represents the interests of adult education associations and other organizations in the field of adult education which should benefit from a separate budget line for such organizations. In order to secure research such funding, however, EAEA should co-operate in joint research and development projects with ESREA and EUCEN.
  - l) Within the human resource development programmes of the European Union, it is vital to allocate funding for the training of young researchers and the continuing professional development of experienced researchers in the area of adult education. This is possible to a very limited degree through the participation of Ph.D students within ERASMUS, where the international summer school organized by the ERASMUS project **Studies in European Adult Education is an example of what is possible**. Opportunities for research students to participate in the ESREA research seminars is another excellent example. The European Union should support a regular series of European and regional seminars and summer schools which could be organized through the ESREA research networks. Much more has to be done in this area. There is a need for mobility opportunities for research students and staff from the southern European countries. This would enable them to participate in the more structured research-training programmes in other countries before they are able to establish their own programmes. Language training should be an essential component of training programmes.
  - m) European Union funding should be made available to support research networks, such as those organized by ESREA, and to enable researchers and research students to attend the seminars organized by these networks.
  - n) It is vital that the European Union makes resources available for the establishment of a European data-base for the systematic registration of fundamental and applied research in the area of adult education. This could be achieved on the basis of 'add-on' funding mechanisms, where national governments and the European Union each contribute 50% of the necessary costs. This would facilitate the integration of national data-bases within a European system.
  - o) It is necessary to make European Union funding available to support the activities of ESREA. These extensive activities are currently financed by institutional and individual membership contributions, reduced for members from the central and eastern European countries, while the hidden manpower costs of running the ESREA research networks are carried by member universities.
  - p) Given the future expansion of membership of the European Union to include the candidates in central and eastern Europe, support for the activities of ESREA could also include the creation of two regional centres to co-ordinate this work in western Europe and the central and eastern European countries. These centres could be based upon existing institutions within ESREA, with both experience and established reputations, which can provide the necessary infrastructure.

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## Adult Education Research Trends in Central and Eastern European Countries

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### **0. Introduction**

The project is a part of the international research project conducted by the UNESCO Institute for Education (UIE) in Hamburg and by the European Society for Research on Education of Adults (ESREA). The title of the UNESCO project, which deals with countries from all over the world, is ADULT EDUCATION RESEARCH: WORLD TREND ANALYSIS (A UNESCO-UIE Project), whereas the title of the project at the ESREA, which deals with only European countries is 'STATE OF THE ART' STUDY OF RESEARCH ON THE EDUCATION OF ADULTS IN THE EUROPEAN COUNTRIES. The Slovene Adult Education Centre is the co-ordinator of the project in the Central and East European countries.

The work on the project was carried on in two stages. In the first stage we gathered and processed the material on the basis of the questionnaire and dispositions prepared by the ESREA for all European countries. The answers to the questionnaire were sent in the form of national reports by the following countries (in brackets authors of the reports are given): Estonia (Dr Talvi Marja), Czech Republic (Dr Vladimir Jochman and Dr Anna Petrkořa with co-authors), Hungary (Dr Pal Soos, Dr Kalman Rubovszky), Lithuania (Edita TreŦiokiene), Slovakia (Dr Josef Pastier), Slovenia (Dr Zoran Jelenc), and Serbia (Katarina Cekoviċ, M.A.). On the basis of the analysis of the material submitted a joint report was prepared: 'State of the Art' Study of Research on the Education of Adults. A Synthesis of the National Studies of the Czech Republic, Estonia, Hungary, Lithuania, Slovakia, Slovenia and Serbia. The Author: Zoran Jelenc, Slovene Adult Education Centre, Ljubljana, January 7th, 1994. The report was discussed at the workshop in which participated experts from Estonia, Hungary, Slovakia and Slovenia (as authors or as representatives of national studies), and from UNESCO; the workshop was conducted by Dr Jindra Kulich, from Vancouver, as representative of UNESCO. At this workshop it was decided, in addition to adopting other conclusions and recommendations, that the second stage of the project should be carried out through a new, enlarged questionnaire. This questionnaire was sent out to a greater number of countries than the first one, thus to Albania, Belorussia, Bulgaria, Croatia, Czech Republic, Estonia, Hungary, Latvia, Lithuania, Macedonia, Poland, Slovakia, Slovenia, Romania, Russia, Ukraine; hence to a total of 16 states, among which Serbia was not included because of international sanctions not permitting it to co-operate in UNESCO projects.

To this second invitation for co-operation as many as 11 countries responded (in brackets are given authors who had prepared the reports specifically for the study, while the materials used and their authors are listed in the reference section at the end of the report): Bulgaria (Dr Marija Makedonska), the Czech Republic (Dr Vladimir Jochmann, Dr Vera BoŦkova), Estonia Dr Talvi Marja), Croatia (Dr Silvije Pongrac), Latvia (Dr Andris Plotnieks), Lithuania (Dr Danguole Beresneviċiene), Hungary (Dr Andor Marotti, Dr Pal Soos), Poland (Dr Izabela Ratman-Liwerska), Romania (Dr Nicolae Sacalis), Russia (Dr Serguey Zmeyov), and Slovenia (Dr Zoran Jelenc).

The objectives of our research were:

- to analyze and to bring out the current state and trends in the research of adult education in Central and East European countries, all within the broader context of social development and of the development of adult education; particular interest was paid to changes occurring in the countries under investigation after the fall of the state-centralistic socialist or communist societal system;

- on the basis of what has been found out here to offer for further consideration the main possibilities for possible changes in the existing situation.

As a part of the world-wide project our findings should contribute towards determining the current state in the research of adult education in the world and towards the seeking of solutions for its changing, if it turns out that this is required.

In the second stage of the study the questionnaire was enlarged in comparison with the ESREA questionnaire so that to questions concerning the research in adult education questions about general conditions in both the social, political and economic development of the state and in the development of adult education were added. The authors were requested to make a comparative description of the changes occurring in the state in the overall development, in the development of adult education, and in the research on adult education since 1989; hence our interest was focused on the comparison of the current state with the former one. The participating authors were additionally requested to send us materials dealing with this issue or to give us information about sources that could be used in our study. The response to our demands was fairly satisfactory.

### **I. Social, Political and Economic Changes in Countries under Consideration**

The countries of Central and Eastern Europe treated in our report can be more reliably identified if we call them former European countries with centrally (state-and-party) guided Socialist (or Communist) order.<sup>1</sup> Such a situation and social order most typically inter-connects the states under consideration, these being - as stated already in the introduction - Bulgaria, the Czech Republic, Estonia, Croatia, Latvia, Lithuania, Hungary, Poland, Romania, Russia, Slovakia, and Slovenia.

It is stated (POLTURZYCKI 1993: 348) that all the countries of Central and Eastern Europe take up as much as 68 percent of the territory of the Continental Europe, and that they make up 49 percent of the entire European population. Their share is accordingly - at least as regards the quantitative aspect - far more significant than it would appear at first sight. Here are involved 21 nations, among them 13 of Slavic origin (ibidem). Since the breakdown of the communist rule these states have been undergoing lively re-structuring, not only political and economic but also in their national and governmental-legal identity. There have originated a few new states, which formerly (at least during the last 45 years) were not independent (states of the former Soviet Union, of Yugoslavia and of Czechoslovakia), some states have regained their former independence. In order to achieve these changes they had even resorted to military means.

Irrespective of all the civic-legal, linguistic, national, cultural, economic, geographical and other differences among the countries under examination, all of them are undissociably related by the fact that after the Second World War, or already during it, they came to belong to the so-called Eastern bloc, which had fatefully shaped their internal system and activities for almost half a century. The totalitarian, one-party (Communist) dictatorship imposed in these countries by the former world power, the Soviet Union, even in these mutually so diverse states managed to establish a firmly uniform manner of state order, control, and life in general. Its characteristics are: the rule of the Communist party, predominance of ideological criteria in decision-making, abolishment of pluralism and democracy, centrally led and controlled economy, considerable degree of equality of all social state (with the exception of the privileged political elite), isolation of state and population from states with a different societal system, the spreading of total domination over people (also through intimidation and all kinds of infringement of human rights), prevention from the access to knowledge (except to the kind propagated by the authorities), the propagation of selected,

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<sup>1</sup> In Central Europe there are also other countries, and besides some of the states under consideration belong more to Southern than to Central Europe, while others are known as the Baltic states. In spite of that we shall in our report preserve the term 'Central and Eastern European' countries as they have been labelled as such by UNESCO and ESREA already in the draft project and also as these labels have general currency.

ideologically acceptable values, etc. Such a state organization is characterized by low productivity and unsuccessful economy and this had substantially contributed to the downfall. This social order, however, had also a few positive aspects, such as guaranteed employment, guaranteed basic social and health-security rights for all conformable citizens, access to basic education for all people and for many among them also access to higher degrees of education free of charge.

The state-Socialist (Communist) social order - if evaluated by its total effect - caused to the states and people affected by it a considerable political, economic, cultural, ecological, moral, and commonly human harm. The states on which this social order was imposed had irrespective of their previous varying degree of development (some, e.g. Czechoslovakia, were among the most developed ones in the world) finished this 'dark' period as less developed ones, when compared with West European countries. In all the countries affected this period had discontinued the normal course of development, the advancement of their own culture and of their own economic trends; it had discontinued their integration into 'Europe' and had caused estrangement in communication and a lag behind in socio-historical developments.

From such an isolation and retardation it is difficult to come back. Also if the return and the changing have been adequately planned, only gradual changes are feasible.

The year 1989 - with the symbolic removal of the Berlin wall - signifies for all these countries a historical turning point. The breakdown of the Communist social order is again causing in all the countries in question similar social, political, economic and other changes. The differences, however, remain to the extent in which these countries differed in their previous characteristics and traditions and in their present ways of realizing their independence and of cultivating their original features as a state and as a nation. One can thus notice a greater developmental elan in those countries which have through the breakdown of the Communist rule won its national independence (e.g. the Baltic states and Slovenia), a bigger economic successfulness in those countries which had already formerly had a more developed economy (e.g. Czech Republic, Hungary, Slovenia). But otherwise all of them are more or less characterized by: the introduction of market economy, private property, restructuring of the labour market, concern for the development of production and new technologies, competitiveness, deregulation of management and legislation, ensuring of civic rights and democratic participation in decision-making, introduction of multi-party parliamentary democracy, bigger differences among social strata, life according to principles of personal responsibility, openness into the world, searching for contacts with European associations, internal regulations determined by the principles of the legal state, guarantee of human rights for citizens, concern for environmental protection, and so on.

All these changes, of course, do not start to operate in such a way that they could be felt only as positive achievements. On the contrary, the changes tend to bring along transitionally unfavourable states. Thus, it can be said,

- in policy and administration: a transition from the strong policy-making (which in an extreme form amounted to suppression of initiatives and the creative spirit) may lead to transitional situation of disagreements and anarchy; from a seemingly well-ordered co-existence of nation, cultures, religions it may come to excessive nationalistic, religious and other forms of intolerance and demands, from would-be on-going development to critical situations in politics, economy;
- in economy: from the controlled system in economy (which ensures jobs for everybody, although in firms with average and backward technology; through guaranteeing social rights in predominantly big, state-owned enterprises the way leads to the uncertainty of market economy, where firms are quickly coming up (a great number of small firms) but also likewise closing down; to a predominantly systemically (at least for the time being) unregulated economy, with demanding and risky processes of re-structuring, the emerging of private economy; through the demand for new technologies and (over)rash adaptation to them; through the new taxation system making itself felt on the shoulder of every firm

and every individual; through the new monetary and banking system which demands of everybody a higher degree of being informed and a higher capability for decision-making;

- in employment: from an almost full employment and the related less responsible and consequently less taxing work to increasing unemployment, increased personal responsibility and demanding nature of work, to the struggle for jobs;
- in the style of life: from the state of being uniform (according to the Soviet model) at the same time also guaranteeing in a larger degree the satisfaction of the fundamental needs of everyday life and social security a transition to uncontrollable plurality and increased uncertainty entailed by the not-as-yet adequately shaped civil society (in the processes of the transformation of laws, management, political culture, operation of political parties, forms and ways of government), by inexperience in the developing and fostering of democracy, and by the state of people being unaccustomed to the possibility of co-operation in decision-making;
- in national identity: from international isolation (despite the otherwise proclaimed internationalism) to the openness of the state, along with adopting stricter criteria for successful co-operation in competition with others; from the seemingly resolved issues of nationality to emerging phenomena of nationalism and to coping with nationalistic question with military means; from seemingly harmoniously operating federal states to conflicts among them and to the search for solution through the formation of independent states;
- in values: from firm and fully shaped (if inadequate) values to the search for wholly new ones or to the search for values from others, where it turns out that such value-systems cannot solve many social problems; in the vacuum of values and lack of orientation also socially negative outcomes are possible.

Many authors of articles which were used in the preparation of this report (in particular Basel 1992; Hartl 1993; Kulich 1994; Ratman-Liverska 1993 and 1994; Stefanov; ěiklova 1993) offer most sensitive accounts of how people undergo these changes; these feelings are clearly not pleasant, they have their positive as well as negative aspects, and - to quote Ratman-Liverska (1993:13) they cannot please anybody. They are described as 'postcommunist schizophrenia' (ěikova 1993: 737) caused through the rapid change of social status and the loss of former identity with all the people. In comparison with refugees or migrants, who are generally a small group in the new environment, the changes in former Socialist countries involve changes including the whole nation; while the nation has not changed the place of residence it is the society around it that has totally changed - not only views and attitudes concerning the position, but even the borders and the name of the country, its way of organization, flag, coat-of-arms, national anthem - and this is something that some people have experienced in their lifetime not only once but several times. In spite of it, however, some find it hard to adapt themselves to phenomena that they have already forgotten.

The situation to be designated by external signs (changes, the beginning of new dynamics) as something positive contains numerous internal antagonisms: it is not at all easy to change people who have lived in a particular way for forty years (Basel 1992: 54). The formation of social consciousness requires a longer perspective; at variance with this, however, is the requirement that the situation should change more rapidly (in three to four years), otherwise the differences between these countries and the other will increase even quicker - and this will lead to "political instability, social disorder and dangers for everybody", including the West; therefore these countries urgently need help of other (developed) countries (ibidem: 58). But it would-be naive to expect that the 'West' can quickly or can at all solve the problems of Central and Eastern European countries, for it has no recipes for that (ěikova 1993), and besides, with its unsolved problems (unemployment, racism, corruption, social differences, poverty, homeless persons, terrorism, mafia, drugs, pornography, consumer's mentality, brute competitiveness and so forth) it offers no good

example. What an ideal is it that "if we try hard, the most we can attain is to be the poor relatives of the West" (ibidem: 747)? Therefore it is not strange that people again start trusting in the old days which are becoming an ideal pattern rather than in uncertain new promises; therefore at free elections they vote in their respective states parties that have originated from former Communist parties. Transformations also cannot be realized through strictly defined models; there come up asynchronisms between administration and the degree of social consciousness, there come up many paths pursued by a particular party (Ratman-Liverska 1994).

These are only a few notes towards the elucidation of the sociological and psychological - beside the already mentioned economic, cultural, and political - difficulties felt in the countries of the former Socialist bloc<sup>2</sup>). One might also mention that resistance against the changes is a natural and an expected phenomenon; it is further increased by the lack of knowledge needed for carrying out the changes. In view of the incomplete information (which cannot be complete since many systemic questions are not as yet solved, all the necessary laws not passed, and rules of market behaviour not yet formed) the resistance keeps growing. Confusion is coming to be felt among people. And from such a state there is no long way to destructiveness.

The search for the way out and for solutions will not be easy. But let us be optimists and let us believe that people are by their nature disposed to search for them and through efforts and perseverance also apt to find them. In doing this they need help. A significant help can here be offered also by adult education, which is briefly discussed in the next chapter.

## **II. The Situation of Adult Education in Countries under Consideration**

Our study so far already permits us to assume that for the countries under consideration adult education performs a very significant role<sup>3</sup>, whereas the general social circumstances outlined point to the presuppositions about which are the educational fields or contents that are for particular countries most relevant.

All the countries under consideration have similar needs for adult education, and these can be classified in a few typical groups, specifically<sup>4</sup>:

- a) society and democracy: in brief this refers to the knowledge helping the citizens to understand, accept, and develop the democratic society and policy as well as the processes of how they are being shaped and how they operate; these are the questions of pluralism, the new social order, the entire social and cultural context, of social circumstances, democratic relations, responsible citizenship, of the developing of institutions of democracy and of local communities, of the relations between social groups different by nationality, culture, religion,, etc.), of relations with other countries, of peace and co-operation among nations;

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<sup>2</sup> At this point these issues will not be discussed in any greater detail. They have been elucidated to an extent that will be useful in presenting the societal bases of the subject at discussion - research in adult education.

<sup>3</sup> This as well is doubtlessly confirmed in the relevant material examined. Both in responses to our questions and in other sources there are very rich, weighty, and useful considerations and proposals concerning the development, needs, and opportunities of adult education in former Socialist countries of Central and Eastern Europe. In our report we briefly summarize some of the more significant findings inasmuch this is necessary for the better elucidation of our central theme.

<sup>4</sup> The order in which they are enumerated does not necessarily reflect the rank of their significance, although the first places on the list are taken up by the needs that are most common.

- b) economy: training and re-training (of workers, especially of workers in the management and of entrepreneurs, but also of citizens and other persons) for the new organization and operation of economy, which includes in particular: the principles and the operation of the free market and market economy, productivity, quality of production, introduction and development of new technologies, efficiency of labour, modernization of the knowledge for work and for relation at work, the conduct of business, the human resources development, needs (by branches, fields of work), banking and financial operations, etc.;
- c) employment: education, training and re-training of the employed and of the unemployed with the view of preserving, changing or obtaining work;
- d) education: acquiring of general education and of professional training and thereby the improving of the vocational and educational structure of inhabitants by kinds and levels;
- e) general education: in various fields and with different levels of demand; both practical knowledge for everyday life as well as humanistic knowledge, of art, philosophy, etc.;
- f) some specific and relatively independent fields of knowledge, such as: foreign languages, information and computer technology, ecology, new legislation, administration and systemic organization;
- g) education of special groups of population: the disabled, migrants, people living in the country, less educated people, elderly people, etc;
- h) literacy and functional literacy;
- i) training of adult educators.

The needs enumerated exist in more or less all the countries in question. This is also a fairly common picture of the needs for adult education under circumstances present today. But the true picture of the realistic situation in the countries under consideration as a whole or by individual countries is obtained only when we have established the priorities and short-comings by various different criteria, such as: the contents, the systemic and legal regulations, the network and operation of organizations, and the financing. In making such a survey one finds that all the fields are not everywhere equally stressed and significant either for the state as a whole or for individual structures or individuals themselves.

If we take a look at the priorities according to contents we find some typical priority themes which consistently re-appear in all the states, or rather denote a common highest priority of the transitional period in which these countries happen to be. There are actually great demands in these fields of knowledge and they are no merely verbally expressed demands. These are: - training of top management and businessmen; - training and re-training of the unemployed; - learning of foreign languages; - information and computer technology; and additionally, with somehow lower intensity, also: - training of citizens for pursuing new possibilities in economy (e.g. enterprises, opening of small firms); - training of citizens for banking and financial business (stock exchange, shares, interest rates, investments, etc.); - keeping the citizens informed about new legal and systemic regulations and/or measure.

Just as these countries have fairly clearly articulated common priorities as regards the contents so they have in adult education also typical shortcomings in the contents, in particular: - education for acquiring a degree, all forms of school and formal education (at all levels); - general non-formal education (different contents for personal needs, cultural development); - political education and education concerning trade-unions.

The shortcomings mentioned represent even retrogression in comparison with the already achieved previous state of affairs (when these fields were still supported by the state or by politics). But then there are other shortcomings that can be designated as such also or above all in view of the already realized social or personal needs not in fact as yet adequately realized, thus: - education for citizenship and democracy; - education for more efficient work, working habits; - updating and improvement of knowledge; - education of younger adults; - education for ecological responsibility; - agricultural education; - relations among ethnic groups.



Both priorities as well as shortcomings can be accounted for; but they are the consequence of both general societal (political, economical, cultural) circumstances, and in part the shortcomings in the systemic organization and in the development of adult education, which we shall briefly outline below.

But before starting with that we should note that, as a rule, each of the countries under consideration, has its own specific priority field, or also its specific shortcoming, and by virtue of this the individual countries differ among themselves. A typical example is, say, Croatia, where because of the war special emphasis is laid on the education of special social groups (the disabled, refugees, returned emigrants, soldiers), and where in addition to other priorities special stress is put on education for peace and understanding among nations (PONGRAC 1994). In Bulgaria they speak about a wholly destroyed system of professional education, this being a consequence of the fact that the state has not got necessary developmental plans, while on the other had also the closing down of the previously operating institutions has contributed its share; it gives priority to their reconstruction (STEFANOV). In the Czech Republic and similarly in Slovakia one may notice the rise of andragogy in academic institutions (HARTL 1993). In Estonia great emphasis is being laid on training system model in view to contribute to the increasing the labour competitiveness and to the expanding business within the local community for supporting regional development, for which purpose a special project has been worked out (LAANVEE 1994). Similarly in Latvia where in connection with the preparation of a model for economic re-construction of the post-Communist states they lay great emphasis on qualifying people for higher skills and on re-training of specialists, businessmen, and citizens (PLOTNIEKS 1994). In Lithuania the decline of participation in formal education (evening schools) is getting mitigated through intensified organized self-education of individuals or groups. In cooperation with a foreign partner Hungarians have started a project of reviving folk high schools (TOTH 1989) and with a loan from the World Bank and in cooperation with the Ministry of Labour they have started a modern institute for re-training, with the network of its institutions extending all over the country. Poland has established centres for civic and economic education in association with the project Civic Education in the Democratic Society, which is being carried out in conjunction with the Ohio State University (RATMAN 1994). In Slovenia they have managed through active forms (study circles) to motivate large numbers of citizens for learning and education (JELENC 1994).

In the continuation we shall present schematically and briefly the current systemic organization and development of adult education in countries under considerations and its causes; here we are aware that such a presentation could be also a bit oversimplified.

Irrespective of the former tradition and development of adult education all the countries of Central and Eastern Europe were in a way, some more and other less, following the European patterns and traditions and had already in the last century or even earlier already fairly developed forms of popular education, while at the beginning of the present century they were already treating adult education as a special and autonomous sphere of education. After World War II all these countries had to subordinate themselves to the Soviet model of education, which was giving priority especially to school and to political education - all this in the name of the development of workers and the working class (while the benefit of this went primarily to the political elite); in particular general, non-formal education (for one's personal development) was placed into the background, even if there were active many forms of cultural, popular-scientific, and in trade-unions organized education (cultural homes, associations for the dissemination of scientific knowledge, socialist academies, trade-unions educational centres, and so forth), where the contents were selected according to ideological criteria. Yet also during this time many of the countries had found for themselves quite some ground for free activities and were accordingly reaching a considerably high level of development of adult education (e.g. The Czech Republic, Hungary, Croatia, Poland). During the last period of the state-Socialist order and Communist rule (least so in countries belonging to the former Yugoslavia) the circumstances were becoming everywhere harsher and much less favourable for adult education. At that time we had a great decrease in the participation in formal education and the closing of formerly operating forms of free, non-formal education.

This was the heritage with which the countries under consideration were passing into the post-Communist period. Now the unfavourable situation in the systemic organization of adult education was further aggravated by political and social circumstances. The states, for the most part, are treating adult

education as a child and a relict of Communism, giving it no support. Governments are failing to see or do not want to see the benefits coming from adult education (KULICH 1994). The economic conditions are everywhere critical and this is reflected in the strong decrease of the financing of education through public means and here particularly small support is allotted to adult education; this field is being left over to the laws and operation of the free market; for this reason most active are those programmes which are in the interest of either individuals (foreign languages, commercial undertakings, computer technology) or economy (businessmen, managers), or needs must be financed by the state if social unrest is to be avoided (the unemployed). In this way adult education no longer enjoys an automatic support of the state and it also remains without broader support from firms and economy. There is a decline in the participation in programmes for general personal needs, for acquiring formal education, there is no sufficient support for civic education, etc. Such a situation - very suitably expressed in the statement that " education is among the last priorities of the new democratic government and adult education is the last within education" (BASEL 1992: 57) - is most characteristic of the countries which were so far in adult education most developed (The Czech Republic, Hungary, Poland) but better, for instance, in Estonia and Slovenia, where the newly arisen social circumstances (the establishing of the independent state, which may well stimulate the country towards more ambitious developmental projects) have thanks to the highly active endeavours of experts in adult education facilitated a comparatively good development also in adult education; and in most countries the profession has for the most part lost its position and possibilities for exercising influence.

To the picture described here belongs, of course, also the fact that in these countries adult education has not yet been legally regulated (new laws are largely as yet non-existing, with predominantly the old rather inadequate laws still in force), are still in administrative regard unregulated (in most cases there are no administrative units, or they are weak, the competencies among the ministries are not clearly defined) and the network of providers of adult education is developing through, as it were, blind forces (many previously operating institutions are closed; numerous new ones, in particular, private ones are springing up, without adequate governmental direction and support); there remain old organizational structures, the same teaching methods and behavioural patterns among participants and among teachers, bureaucratic approaches (KULICH 1994); there has been a great drop-out among personnel employed in adult education. To put it in a picturesque way (cf. HARTL 1992: 62): a vacuum where the old is being abolished and the new has not yet come up.

There are also a few signs indicating shifts to the better side, in particular: in three countries (Estonia, Hungary, Slovenia) special administrative units have been founded at the Ministry; in most countries (the Czech Republic, Croatia, Rumania, Slovenia special laws concerning adult education are in preparation or have been passed already (Estonia); great expansion is witnessed by journalism and publishing; concerning contents and organization the autonomy of institutions of adult education has increased; international co-operation has been growing and professional associations of adult education are being organized. But on the whole one may nevertheless speak about a stagnation or even retrogression, and even in the future a quick development cannot really be expected.

In such a situation adult education is clearly unable to cope with all the big and still increasing new needs, described at the beginning of the present chapter. A significant role in the changing of the situation should be performed by research; what are its possibilities here is discussed in the following chapter. The role of research is all the more important as experts are agreed that foreign patterns cannot simply be translated into new social circumstances but have to be examined beforehand and their adequacy must be assessed.

### **III. The Situation of Research on Adult Education in Countries under Consideration<sup>5</sup>**

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We did not have complete data for research work carried on in Latvia; also rather incomplete are the data for Romania and Slovakia.

### 1. General Situation, Policy, and Financing

It is characteristic of the period up to the year 1989 that in most of the countries under consideration the research activity was comparatively well developed, the strongest being in Czechoslovakia, Hungary, Poland and in Yugoslavia. (KULICH 1994) This activity was located either at universities and schools of higher education or in special institutes and specific research institutions of ministries; the latter were especially well equipped and had a fairly widespread activity. According to Kulich (1994: 15) in many countries research was not carried out at universities but was located at the academies of science, at socialist academies and in special institutions where it was easier to exercise political control. The research went on according to guidelines of the state or the sector plan. At least the official contents of the research were determined by current policy and ideology.

The present situation of the research on adult education is similar to that outlined in the previous chapter. The crisis in the societal organization is of necessity reflected in the crisis in science, although research is now - when it will no longer be required to satisfy the needs imposed by the demands of the societal order in 'real-Socialism' - faced by great challenges; for researchers this is "in spite of its difficulties and barriers an exciting task" (MALEWSKI 1992: 63).

The general situation in the research on adult education is characterized in particular by the following features that are more or less common to all the countries under consideration:

- a) There has been a strong decrease in the intensity and extent of research if compared with the situation before the societal and economic changes;
- b) the intensity of the political changes has re-directed the research interests to other fields; technical and economic projects are favoured at the expense of humanistic ones; investments made in research, which are in any case low, are particularly weak as regards investments in the research of adult education, this occupying a place weaker still than pedagogy; in Poland, for instance, it should be excluded from the competencies of the National Committee for Research (RATMAN 1994: 13) in comparison with the research on the education of children and youth the percentage of the research dealing with adult education is essentially smaller;
- c) characteristic is the picture of the disorientation in development, to be seen especially in the as yet unclear national priorities and research policy; there is a lack of strategic concepts, co-ordination and survey of the research activity (of the number of organizations and research-workers, their co-operation, technical equipment, organization, financing, opportunities for publishing, technical sources, etc.); governments do not have the overall concept; there is no proper awareness of the research field for adult education; research of adult education tends to remain limited, carried out in fragments; ministries competent for research are not mutually co-ordinated;
- d) the research programme has changed in such a direction that it exclusively lays stress on the applicability of research.
- e) Ideological factors are at work today just as they were in the past only that at present themes that were rejected in Socialism are now given priority (RATMAN 1994: 14).
- f) In research work the following general characteristics are emerging:
  - the cuttings of governmental funds for research and the adaptation of the principle of self-financing of projects, which means that financial means have to be sought from different sources and that they are not secured in advance; there are no special financial means for the research of adult education, as a rule; in some countries (Hungary, Lithuania, Russia, Slovenia) the government allocated the means via special funds for research; for obtaining the means in Slovenia it is significant to have co-operation with partners already having means of their own (these being generally Ministries of Education and of Labour, which in this way pursue their interest in research); the extent of the

government's financing invariably depends on the economic situation which is everywhere poor;

- many potential sources (in addition to ministries there are firms and bigger organizations as well as regional bodies) are in the aggravated circumstances not willing to allocate money for these projects;
- research has become an article of trade (of the exchange of goods) determined by: unemployment, the level of welfare, the wealth of each social group, qualifications required for the market (MALEWSKI 1992: 59);
- also those who do finance educational research (e.g. funds for the development of higher and university education) do not accept adult education as a priority;
- formerly operating significant institutions for the research on adult education are being closed down; the number of research-workers is being diminished; there is no necessary developmental research infrastructure;
- lack of order in the governmental regulation of the influence on the collecting of research data and on the decreasing of the number of useful statistical indicators;
- among the partners which should be interested in adult education and in research in this field there are antagonisms; there are no agreed ways for collecting financial means, the adjustment between the sources of financing and the partners is indeed weak; and this lack of adjustment is an impediment in the development of a unified research programme;
- the characteristics mentioned are perhaps particularly noticeable in the sphere of vocational training, as they are being designated even as "the collapse of the research and development structures" in this field (GROOTINGS 1992: 4);
- research depends on individuals and on their interest; in this respect it may be observed that experts in the practical field usually do not have interest in research.

## **2. Subjects Performing Research and Research Staff**

Research is carried out at universities and colleges (pedagogical schools and institutions/colleges for training of adult educators) and at other research institutions.

As a rule, professors and the staff from universities or higher education institutions perform research projects. Since the research in other institutions is undergoing a critical period, the majority of researchers are gathered at universities. Only in some countries there are separate departments of andragogy (The Czech Republic, Estonia), but otherwise research in adult education is being carried on also in other non-specialized units (pedagogy/education, psychology, also foreign languages); nowhere there exists a separate faculty of adult education. The number of university or colleges engaged - only or also - in adult education is different from one country to another, but everywhere there are more than just one such unit.

The former (governmental) research institutions had for the most part become disintegrated and no new ones, intended specifically for adult education had been started instead. The research on adult education is pursued - additionally to their fundamental project - also by or predominantly by institutes from other scientific branches (of pedagogy/education, labour, social sciences, sociology, philosophy, psychology, organization, law, economics, culture, quality of living, etc.); pedagogical research institutes are in many cases not dealing with adult education.

The number of special research institutions for adult education is not big. They exist in the following countries: The Czech Republic (Institute of Adult Education at the J. A. Komensky Academy); Hungary (Hungarian Institute of Folk High Schools, National Centre of Distance Education); Lithuania (Institute of Pedagogy - Department of Continuing Education); Russia (Research Institute of Continuing Education, Institute of General Education - Department of Andragogy); Slovenia (Slovene Adult Education Centre).

Research work is carried out also in units at the academies of science, ministries of education, at associations for adult education, other research centers (i.e. centre for development of university, association of women etc.).

The number of research-workers strongly depends on the financial means available, but as a rule it is invariably lower than it was before, exceptions being only the Baltic states and Slovenia. In the research on adult education we come across mostly sociologists and psychologists, whereas experts specially trained in adult education - andragogues, adult educators - as a rule hardly exist as there do not exist separate programmes for the education and training of such professional profiles.

### **3. Research Themes**

The research themes in most of the countries considered are not clearly determined by a particular planned, systematic or constant policy. As the state practically does not finance the research of adult education or at least not in a more significant degree, the priorities are determined by the interests of the institutions or by the researchers themselves; most commonly they are determined by university teachers, while the themes themselves are related to the subjects (contents) dealt with in the lectures. Since the national priorities are not identified, research themes come up 'ad hoc' and are also (outside the university) related to coping with tasks of topical interest. The number and the subjects of research work is changing every year. The priorities are likewise not institutionalized.

In view of the circumstances as outlined there is no complete overlook and also no more clear data on research projects<sup>6</sup>.

When it comes to making decisions which of the projects are to receive the financial support from the state - which support is, as said already, modest - the priorities are usually determined by the Ministry of Education or other ministries for the particular field of interests. Here again the point at issue is not what clearly has a certain fixed national priority but rather decisions on applications sent in response to tenders as well as on the selection from among the research projects registered.

Which themes, according to reports, require research? The reports mention in particular the following<sup>7</sup>:

- system of adult education; adult education policy; distribution of roles and functions in adult education between state, social partners and participants; possibilities of the education and training of workers; problems both personal and social of the education of the unemployed; requalification of employees; external studies as a way to diversification of educational opportunities; vocational education; informal and non-formal education; community education; education in voluntary organizations; civic education; operation of

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<sup>6</sup> This was also a great impediment in carrying out our research project, for the authors of national studies and reports most frequently had to assess the situation according to their own knowledge or by means of researchers whose co-operation they had managed to secure - while an insight into the entire situation it was not possible to gain; in Slovenia only the information was made available through a study that included all the relevant factors: research institutions, researchers, and ministries as main sponsors of the research work.

<sup>7</sup> A great many different themes are listed which in our survey will not be given always according to individual countries but only all together.

educational institutions and programmes of education; further education of teachers; democratization of education.

For the purpose of determining the policy of adult education research it is significant to take into account that the former regime was giving priority to projects that concentrated less on social issues and to those less socially committed, dealing mostly with issues related to questions of the participants in education, in particular learning methods and cognitive processes; in his standpoints the author (MALEWSKI 1992: 58) even says that the countries in question are in socially committed projects now starting from zero.

According to what our reporters have to say in our research project (e.g. MAKEDONSKA 1994) we witness recently a changing of priorities. In addition to increased work on developing various basic frameworks for shaping the adult education policy, there is increased interest in theoretical and general research.

Although in many cases it cannot be made clear, since there is not enough money for the projects, which are the research projects that the state gives priority to, it is possible to deduce from statements that from the view-point of public financing priority is given to the following themes: - re-training of the unemployed; - training for new jobs; - distance education; - training of managers; - projects related to educational reform; - continuing education, training and re-training; - education of teachers; - social priority groups; - women in education; - education leadership development; - local administration and the role of adult education.

In the material we have noticed following themes indicated as receiving too little attention in research: younger adults; women in education; characteristics of adult as learners. The list could doubtlessly be extended considerably.

Comparing the present circumstances and needs with those in the past it would certainly be necessary to change research priorities. One of the significant claims, although not to be found in most reports, is the fact the humanistic research projects come at the tail of priorities. It is surprising that comparatively little mention is made of projects that are more closely related to economy and to the development of new technologies, although this is one of the key developmental fields and priorities in the states which have found themselves in the transition period; such a priority is supported for instance by the National Committee in Poland. As an exception let us mention a theme which is nowhere - with the exception of Bulgaria - quoted as one deserving priority: the study of the phenomenon of illiteracy, which is owing to the great drop-out in schools again increasing (MAKEDONSKA 1994).

In order to establish priorities among the research themes also a special questionnaire was sent to the authors of national studies. Since only from five authors response was received we accordingly have the report on priorities for five states: Estonia, Croatia, Poland, Russia, and Slovenia. This represents, of course, less than half of the participating countries and the sample cannot be representative for them all. The available data are interesting as regards orientation, therefore they are given in tabular form (page 18-20) as well as in a description and interpretation of findings.

Our questionnaire contained three kinds of questions about priorities:

- priority themes by financial support; the question here was which themes have priority in financing; on the part of the state, of social partners, international funds and from other sources;
- priority themes generally: the questions were about priorities for the state, political bodies, researchers, providing institutions, and international bodies; we requested also an estimate of priorities as regards social needs;
- priority themes by period (before the year 1989 and after 1989): for the state, researchers, providers, and other sources.

For each questionnaire we submitted for evaluation 20 themes, specifically:

- 1/ theory, conception
- 2/ system, policy
- 3/ society, social development
- 4/ culture, quality of life
- 5/ labour market, employment
- 6/ human resources development
- 7/ formal (school) education
- 8/ general (non-formal, popular) education
- 9/ vocational education
- 10/ needs for adult education
- 11/ accessibility of adult education
- 12/ adult education organizations, providers
- 13/ modernization, new forms/methods
- 14/ characteristics of participants, adults as learners
- 15/ target groups
- 16/ civic education, adult education and democracy
- 17/ younger adults
- 18/ education of the elderly
- 19/ comparative education
- 20/ history of adult education

In our presentation we take as a starting point for our comparison the subjects for which reporters were assigning priorities and here limit ourselves to the state, researchers, and international funds.

**a) State**

As a criterion for assigning priority we shall take the number of the states given in our survey for the individual theme, which means that the reporters for these themes chose them as having priority for the state in their countries. The mark (F) with particular states denotes that the theme has a priority in the financial support from the state. The theme was additionally ranked as belonging among one of the 3 ranks in top priority, in brackets also the number of rank is given which the theme has obtained in various countries by any kind of evaluation.

Priority themes in the countries considered are the following ones:

Most frequent (listed in over half of the countries by any kind of evaluation):

- system, policy (F; 2)
- labour market, employment (F; 1,1,4)
- formal (school) education (F; 1)
- vocational education (F; 2,2,3)
- needs for adult education (F; 3).

Less frequent (listed in two countries):

- modernization, new forms/methods (F; 3)
- younger adults.

Listed only in one country, but with financial support or with rank:

- society, social development, economic growth (F; 2)
- culture, quality of life (F)
- human resources development (3)

- target groups (1)
- civic education, adult education and democracy (F; 3).

If one compares the priorities by period and here takes as a measure of difference the difference in the number of states that regard the theme as a priority one in one period or another - and here we shall regard as significant the difference for two or more countries and essentially different ranks - then here comes up just one well-marked difference in priorities of states, this being in: - civic education, adult education and democracy, which is as a priority after 1989 ticked off by three countries, while earlier on by none. A somewhat more remarkable priority after the year 1989 is found also in - labour market, employment, which has in two countries rank 1. There are no other, more significant differences in state priorities during the two periods.

#### **b) Researchers**

With researchers the priorities will be compared only in general sense, irrespective of the financial support which a research project might have from various sources. In brackets we give characteristic ranks assigned to the individual themes during the comparison.

Priority themes among researchers were the following:

Most frequently (in over half of the countries) listed themes:

- theory, conception (4 states; once rank 1)
- system, policy (2,3,1,)
- comparative education (3).

Eight themes were not chosen at all, these being: theory, conception; general (non-formal, popular) education; accessibility of adult education; adult education organizations, providers; characteristics of participants, adults as learners; education of the elderly; comparative education; history of adult education.

Less frequent (listed in two states):

- needs for adult education (1)
- modernization, new forms/methods (3)
- history of adult education
- functional literacy.

Mentioned only in one country, but with financial support or with rank:

- labour market, employment (2).

Priorities on the part of researchers by period are the following (in the comparison we use the same criteria as used in determining the priority of states):

Prior to the year 1989 there was only one marked priority: characteristics of participants, adults as learners (4 states; ranks. 1,2,3).

After the year 1989 there is only one more marked priority theme: adult education organizations (3 states; one rank 2) and another less marked one: theory, conception (by rank: 1).

#### **c) Social partners**

The priorities of social partners were estimated according to which are the themes that they are ready to allocate financial support for. We have found:

Most frequently (in over half of the countries) listed themes:



- labour market, employment (2,2,1)
- human resource development (1).

Less frequent (listed in two states):

- vocational education.

Mentioned but in one country only:

- adult educational organizations, providers (3).

#### **d) International bodies**

Priority themes sponsored by international bodies and funds in countries under consideration are compared in general, by financial support, and by periods.

Most frequently, in over half of the countries listed theme is only:

- needs for adult education (2).

Less frequent (listed in two states):

- system, policy (F; 1,2)
- labour market, employment (F; 3,3)
- general (non-formal, popular) education (F; 1)
- accessibility of adult education (2,3)
- modernization, new forms/methods (1,3)
- civic education, adult education and democracy (F; 1,2)
- comparative education (F).

Mentioned only in one country, but with financial support or with rank:

- theory, conception (F; 2)
- culture, quality of life (F)
- vocational education (F; 2)
- adult education organizations, providers (F; 3)
- education of the elderly (F; 1,3).

Only seven themes were not chosen as priorities of international bodies: society, social development; human resources development; formal (school) education; target groups; younger adults; education of the elderly; history of adult education.

As regards the priorities expressed in the answers to our questionnaire we may emphasize the following essential findings:

\* State priorities - at least the most outstanding ones, which also receive financial support inasmuch as this is in financially unfavourable times possible - are for the most part such as could be expected: in the foreground there are labour market and employment, formal (school) education, vocational training and the system and policy and needs for adult education. Those themes that do not find broader support in most countries are divided differently by individual states, depending on specific circumstances and on the state in adult education in a particular country. These are especially: research of education for particular groups of inhabitants, on general non-formal education, on the quality of life, and the like. We would, of course, expect a larger state support for the research which is in the function of the social and economic development as well as the development of civic education and education for democracy. The support for the theme mentioned at the end has been during this period, in comparison with the previous one, nevertheless somewhat increased, whereas the weak support to the research on education in the function of development indicates that the understanding of the significance of adult education for the development in the countries under consideration has for the most part not yet matured.

\* Social partners, similarly, are the most interested in education for the labour market and the development of human resources. But rather less consistent is - even if in some places it happens to be - the weak support to the research of vocational training (surprising and not too stimulating!) and (rather more expected) support to performers of adult education as well as to the updating and developing of their work.

\* Researchers are those who are aware that development must be based on well developed profession and theory. Therefore their priority interest is addressed to the theoretical and systemic issues which they take up comparatively. Understandably researchers are not neglecting other themes, such as studying the needs for adult education, functional literacy, modernization of the methods and forms of education, history of adult education, and also education for the labour market is not being forgotten. In the orientation of the researchers great shifts are coming up which can be accounted for also in the sense that researchers had already in advance of the changes of the social order known what to deal with in their research. We find confirmation of what has already been found out - that in many respects the researchers have abandoned the narrowed-down orientation from the researching of the characteristics of participants (typical for previous repressive social order) and are now increasingly orienting themselves to socially more topical concerns.

\* The priorities determined by international bodies funds will not be more extensively commented upon. We just need to state that this support is as regards themes extremely broad, reaching from theoretical issues to quite applicative ones (as for instance accessibility of education, and organization of performers), to issues close to immediate interest (like the education of the elderly, quality of living).







A significant insight into the issue of research priorities can be obtained from the titles or leading themes of research projects which are currently in progress or have been in progress since 1989<sup>8</sup>; the titles being named in sources available are:

Czech Republic: - Overall social systems of research and education (1986-90);

Croatia: - Models of adult education within the framework of social and professional changes; - Education and quality of living; - Structuring of the composition of gerontologic theory and practice;

Estonia: - Estonian National Program and State Program for Education of Adults; Educational Needs of Adults in Estonia Today; - The Role of School (Education and Adult Education) in local development; - Policy and Practice of Professional Continuing Education of School Principles; - Teambuilding and Building a Team as an Andragogical Problem.

Hungary: - Training for the labour market (1991-1993); - Comparative andragogy (1994-1997);

Lithuania: - Group Learning Methods for Adult Education; - Problems of Unemployed Personality; - Values, learning motivation and expectations of adult students and teachers; - Adults in the System of Higher Education and the Model of it's development; - The Models of Youth Schools as an Alternative to the Daytime General Secondary Schools for Young Adults; - Models of Informal Adult Education; - The Model of Vocational Education in Lithuania; - The Psychological Assumptions for Lifelong Learning in Lithuania; - Current Situation in Informal Adult Education in Lithuania;

Slovakia: - The Role of Adult Education in the Transformation of our Economy and Social Development: project compound of these special themes: - Adult Education Market and its Specificities in Economy Transformation Leading to Informational Society; Professional Competence of Adult Education Workers, the Present State, Needs, and Perspectives; - Analysis of Educational and Social Needs of the Adult Education Market Customers; - Management and Marketing of Adult Education Institutions;

Romania: - Vocational training; - Functional literacy; - Education of parents;

Slovenia: - Adult Education as a Factor of Development in Slovenia; - Definition and Creation of National Programme of Adult Education in Slovenia; - Adults as Learners in Slovenia; - Outstanding Experts on Adult Education; - Functional Literacy in Slovenia; - Pedagogic Development and Andragogic Disciplines in Slovenia from the Aspect of Modern Theoretical Paradigms and Trends in Adult Education; - Introducing Distance Education in Higher Education of Slovenia; - Further Education System of the Employees in Connection with Economy Re-structuring; - Adults' Experiential Learning in Different

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The list contains the themes reported by the authors as being currently worked on; therefore here are not mentioned the numerous themes otherwise quoted in the answers to the questionnaire on priorities, where priority themes are given irrespective of whether they are in fact being carried out at the moment or not. In connection with the list mentioned it also has to be said that it was made by authors who had not all reported equally exhaustively. Some of the authors answering the questionnaire on priority fields in research did not think it necessary to give in addition the titles and topics of research projects. Therefore the list is not to be regarded as containing all the themes that are currently being worked on in the countries under consideration. From the list it is not possible to conclude how extensive the research in individual countries is but the list rather offers us orientation on research topics in a particular country.

Socio-Cultural Strata; - Introducing Study Cycles in Slovenia; - Education and Training of Work Force Mobility in the Slovenian Labour Market; - Improving Educational Supply for Unemployed; - The Origin and Development of Adult Education in Slovenia.

Titles of international research projects as given in the national reports are:

- Bulgarian Attitudes Towards Continuing Education, in cooperation with the Union of German Popular Universities;
- the European project New Initiatives for Researching Vocational Training in Central and Eastern Europe; within the project Platform for the Exchange of Information in the Study of Vocational Training" has been prepared (Bulgaria);
- Educating Cities (International Association of Educating Cities) (Estonia, Slovenia);
- European Village (with United Nations Association of Sweden) (Latvia);

Projects going on in several countries:

- Adult Education Research: World Trend Analysis ('State of the Art Study' of Research on Education of Adults) (UNESCO, ESREA) - all the countries;
- The Expanding Legislation Environment of Adult Education and Training: The International Comparative Project on Legislative Development Related to Adult Education (UNESCO, EAEA); Czech Republic, Estonia, Hungary, Slovenia
- Literacy Strategies Development in Rural Areas of Industrial Countries (UNESCO) - Czech Republic, Slovakia;
- Adult Education Terminology: Multilingual Data-Base (University of Linköping) - all the counties;
- Distance education (France, Holland) - Czech Republic;
- Future of the Adult Education in Europe - comparative study 'Euro-Delphi Project'- Czech Republic, Estonia, Slovenia.

Otherwise the sources sent in for the present study quote the following priority themes, without giving the names of authors or information on who is directly interested in them (the state, social partners, researchers, performers, international bodies, or somebody else):

Bulgaria:

- school technical education: here they were concerned with particular subject, organizational forms, methods, and efficiency; - needs for the qualification of labour force and state policy in the stage of development;

Czech Republic:

- requalifications; - personal management; - psychological problems in adult education; - distance education; - overall conception of andragogy; - adult education in ecology; - social work and social problems of andragogy; - status of adult education; - comparative andragogy; - adult higher education; - general theory of adult education;

Estonia:

- person as a subject of education; - methods in adult education and their efficiency; - methods as social and cultural value; - communicative competencies of adults; - access to adult education; - efficiency of adult education;

**Hungary:**

- historical problems of adult education; - theory and methodology of adult and continuing education; - theory and policy of culture; - problems of aesthetical and art education; - distance education; - civic-voluntary-community education; - local authorities and adult education; - management of culture, art and adult education; - network of adult education institutions; - problems of folk high schools; - questions of political socialization and education; - the relation between general-liberal and vocational education;

**Lithuania:**

- theoretical model of adult education system in Lithuania;

**Poland:**

- adult education in the development of new technologies;

**Romania:**

- conceptual definition of the concepts and functions of lifelong education and adult education; - psycho-social significance of adult education; - institutional system of adult education and its functions; - the rights of adults; - satisfying of professional and socio-cultural interests of adults; - possibilities and characteristics of adult learning; - relations between school (initial) education and adult (continuing) education; - adult-centered teaching (andragogy) and child-centered teaching; - adult education as a field of the complete educational system; - practical modalities to achieve adult education in keeping with the professional or sociocultural interests of adults;

**Russia:**

- a concept of the system of adult education as a sphere of educational services; - a prospective model of the development of adult education in Russia; - educational guidance service: concept, model, and implementation; - a concept, a model and a sample curriculum of the training of adult educators; - essential principles of adult learning and conditioning of their realization in the process of adult education and continuing education; - socio-economic problems of adult education; - psychological problems of adult education and of adult educators' training; - history of adult education in Russia; - contents and curricula of general secondary education of adults; - problems of training and continuing training of pedagogical and managerial staff of adult education; - future development of adult education; - comparative adult education; - higher adult education; - postgraduate training and retraining; - technology of providing teaching-learning aids; - technology of correspondence education; - vocational (professional) education of adults; - general secondary education of adults; - philosophy of adult education and of lifelong education; - theory of adult learning;

**Slovenia:**

- andragogy, theory and conception of adult education; - the relation pedagogy-andragogy; - network of adult education institutions; - adult education legislation; - the role of adult education in society: its impact on productivity and processes of restructuring; - economic significance, economics, financing of adult education; - educational needs, planning and development of human resources; - contents of adult education; - adult education and labour market; - vocational education; - research on different types of learners (students, prisoners, elderly); - new methods in adult education (multimedia, distance, experiential learning); - new forms of adult education and learning (study-circles, centers self-directed learning, centre for young adults), - functional literacy; - non-formal education in



organizations and local communities; - adult education and democracy; - comparative education; - history of adult education.

It is no accident that in our report comparatively a lot of space was taken up by priority themes in the research of adult education. In addition to the fact that this is a field of highly varied and articulated issues the reason for that is also in the fact that though these issues the orientations and interests of those most decisively determining the current state and policy in research are most clearly expressed. In the contents of this item here under discussion, we can thus see both traces of the past which are firmly prolonged into the present and promising heralds of the future.

#### **4. Organization of Research Work**

The decisions on the adopting and financing of the research programme vary by individual countries, although there is a growing practice of the allotment of means on the basis of public tender and competition among the projects since the research programme is not planned through separately prepared national plans, most of the countries do not as yet have detailed, objective standards for decisions concerning the research projects (but they have worked them out in, e.g., Lithuania and Slovenia, where the decision is made on the basis of a system of assessments given by home experts and those from abroad and where certain quality standards have to be met); thus the decisions are usually additionally affected by various subjective factors. Likewise, as a rule, there is no worked-out system of control; the control of the course of a particular research project is weak - and not comprehensive and systematic.

There is no common, agreed-upon general organization in research work.

In research there predominate or even increase the quantitative methods of research, sped up in particular by the availability of the use of computer technology.

There do not exist special systems and programmes for the training of those engaged in the research of adult education; there exists no system of the education of specialists in andragogy (adult education), which is especially unfavourable for the development of young research staff. Very modest are also the means assigned by the government for individual study of researchers at home and abroad.

The exceptions, when we speak of the governmental financing of the education of adult educators, are studies towards M.A. and Ph. D. degrees; this post-graduate study is as a rule financed by the government. But this no longer applies to post-doctoral studies, where it is necessary to seek help in other and no longer in governmental sources; in certain places they have for this purpose special funds.

The possibilities for acquiring foreign technical literature vary greatly from one country to another. Thus in Hungary they have comparatively well stocked professional libraries, operating mostly at university departments; elsewhere (e.g. Lithuania) they depend on books donated by fellow countrymen from abroad. On the whole the possibilities for buying foreign literature are highly limited, a consequence of which is a poor system of information and of scientific sources. There is the additional difficulty that the study of professional materials in foreign languages requires a corresponding mastery of foreign languages, which many researchers do not have; in former social circumstances this was not necessary as the contacts were predominantly limited to the Soviet Union and on the countries in question among themselves.

Although publicizing and publishing have spread widely, there has been within the country no corresponding increase of the possibilities for issuing publications and of other possibilities for publishing research findings. This has several causes, among which, besides the already mentioned reduction of scope and of possibilities for publishing, are: the stopping of financial help of the government for professional journals; for this reason there is no special organization for the publishing of projects; there has been a decline in the number of journals about adult education (in two countries only they have one each, while other countries have no special journal for this field). Similar difficulties as with the issuing of journals are felt also in bringing out monographs and research reports; only in the Baltic states (Latvia, Estonia) and in Slovenia there exist possibilities to obtain public means for such purposes, but in order to acquire them (Slovenia, Latvia) certain standards concerning the quality of research findings have to be fulfilled.

Likewise, the data concerning professional meetings of researchers in adult education are not stimulating. While in most of the countries there are from time to time held professional meetings and

conferences, these are on the whole rare and the authors of national studies sent in speak even of their decline in comparison with the previous situation (Lithuania, Poland), or even complain that they are not particularly effective (Hungary). Which naturally means that the circulation of scientific ideas is being impeded.

In none of the countries taken into consideration here there exists a special association for researchers in adult education. The exception is Hungary where meetings of research workers are possible with the Sub-committee for Adult Education at the Academy of Science. There are, however, associations of adult educators, which have a significant role and make it possible for researchers to meet at least in their broader professional, non-governmental organization; and it is also true that otherwise these organizations predominantly deal with practical and operative questions and not so much with the work on research projects. The formation of these associations is, however, one of the heralds announcing that in the former Socialist countries of Central and Eastern Europe activities of experts in adult education are being revived.

Also as regards international co-operation it appears that the countries under consideration are gradually coming closer to other, more developed countries from which they had been long years forcefully separated. International contacts and activities are gradually increasing, which is to be seen particularly in:

- possibilities for individuals and organizations to become included in the projects of international organizations, such as, e.g. ESREA, EAEA, UNESCO;
- membership in international organizations;
- participation at international conferences;
- possibilities for exchange among individuals, for visits on the part of organizations, exchange of periodicals, etc.;
- integration in international research networks, such as Tempus, ESREA, Erasmus.

Particularly close is becoming the co-operation between the Baltic and the Scandinavian countries, but otherwise every country is setting up its own contacts. But this co-operation would not be feasible if the developed Western countries and organizations were not supporting it with their own means, since the governments of the post-Communist states discussed here allocate also for this purpose but modest financial means or sometimes none at all. A special possibility for cooperation of Central and Eastern European countries with the Western ones is created through the Soros foundation, which in particular finances the participation at professional meetings but also other projects. Significant help - both professional and financial - has for some time already been given by Deutscher Volkshochschulverband (Association of German Folk High Schools), which has co-operation with most countries under consideration). A great handicap in international cooperation is in most of the countries also the weak command of foreign languages, which is here clearly a prerequisite.

But otherwise pessimistic feelings are still predominating, in particular there where no signs of improvement seem to be on the horizon. Thus, e.g. Malewski (1992;59) finds that it is appropriate in particular "for the time being the overall political and social transformations in Poland make the field of adult education research irrelevant. We are trying to recognize, describe and analyze from scratch the phenomena connected with adult education which only portend the future field of research". But in fact also in this statement optimism tends to outgrow pessimism.

The development will surely, if gradually, turn the present curve which still indicates a decline or stagnation, upwards. This is bound to happen, as sooner or later the great needs for adult education described also in the present contribution will obtain societal support; also, when it has been realized that adult education represents a vital constituent element of successful development, both of the personal development of an individual and of the contemporary societal and economic development, and not as a kind of residue of the communist period. In this pursuit the states of Central and Eastern Europe will urgently need help, both from the developed countries and in the form of mutual co-operation.

But from the general pattern as it has been described so far we must distinguish some countries which may in a research of adult education such either having certain promising characteristics or showing positive shifts in the research of adult education in Central and Eastern European countries be designated

as such either having certain promising characteristics or showing positive shifts in the research of adult education (I quote them here in alphabetic order):

#### Croatia

- In the past extensive research work was carried out including also highly developed infrastructure (Andragogic Centre, the journal 'Andragogija', university departments, active Andragogic Association, issuing of publications, organizing of regular summer seminars); the trend of intensive research has not been discontinued, although because of the war Croatia is in a difficult economic situation, with money lacking already for pending projects; there is an abundance of capable research workers who are left with no possibility of conducting research, as there is no money;
- The number of research projects is not big, but they are financed by the Ministry of Science and Technology.

#### The Czech Republic

- Promising is the development of research work in university departments dealing with adult education, and at the same time associations of adult education are being formed as well as a society of these.
- Intensive work is being done on developing distance education.

#### Estonia

- There as well the state does not finance the research on adult education but at least - doubtlessly through the intensive efforts of home experts it has managed to intensify the study of adult education though financing the projects from means made available by other, in particular, Scandinavian countries; there is even a project including all the Baltic states; Estonian projects are getting incorporated within other European projects;
- Interested in the research are local authorities and individual towns (Talin), as well as particular regions; the research here is again in its contents related to broader societal projects - the development of local communities;
- Competencies for adult education are divided among the state, countries, local administration, organizations, and individuals (2/9);
- As a sign of a great change they point also to the increased concern for research work throughout the country.
- Within the framework of universities they facilitate studying abroad and participation at international conferences.

#### Hungary

- There exist various funds for financing research (public and private, central and regional, university centres and others, domestic and international); the means are to be acquired by the principle of competitiveness in addition to the general national research fund there is also a separate national "fund for public adult education", but this fund is general and not intended merely for research work;

#### Lithuania

- The most frequent financier is the state, while the cooperation of other sources is also expected.

#### Poland

- Investments in research should increase from 0.66 % of GNP in the year 1993 to 1 % in the year 1994 (RATMAN 1994: 13).

#### Russia

- The state finances the institutes at the Russian Academy of Education as well as the projects on university education, including adult education; the means made available by the state are modest.

#### Slovenia

- Adult educators and researchers had very early (from the year 1984 towards, intensively since 1987) anticipated social challenges and through their research prepared the groundwork for the development of the system of adult education and of the profession; with the establishing of Slovenia as an independent state coincides also the bigger governmental support for adult education; in the package of measures there is also the founding of the developmental research institute at the Slovene Adult Education Centre. The structure of work in SAEC is a guarantee for the presence of research work in any developmental project as well as for the implementation of research work into practice through the cycle: research - development/counselling - data processing - education of adult educators - publications.
- Research policy is being created by researchers, but as regards financing the policy is left over to the judgement of ministries (of science and technology; of schools and sport; of labour, family, and social affairs), which mostly allocate means for the research on adult education; the principal decision comes from the Ministry of Science and Technology, which determines the national research and development policy, and decides on the projects on the basis of the co-participation of co-financers (which helps to define the priorities as to contents, in particular in case of applicative projects) and of the quality standards; other partners for the time being do not participate much in the financing (economic and financial difficulties), while also the participating portion from international partners in the research of adult education is increasing;
- Special possibilities for the development of research work are made possible by the special fund for the financing of younger research workers, operating by the principle of competition, where adult education is in principle made equal with other disciplines.

Possibly these are indicators according to which Kulich (1994) estimates that in recent times the research of adult education is in countries under consideration in spite of everything being revived.

By way of conclusion let us take a brief look at the situation and trends in the development of research in Central and Eastern European countries, also at their proposals about how to overcome the present situation.

### IV. Conclusions and Proposals

Central and Eastern European countries have to be viewed from two aspects: from that of their past and also in their present position. These are the countries that in adult education in the past were in many respects on a par with the developed countries and some of them were among the first in developing

particular fields of education, for instance education at universities and at higher schools. They went through a period when adult education was forcefully narrowed into ideologically designed moulds, which in the development of this field entailed grave consequences and retardation. Their crisis has not yet been overcome; in many cases it depends on the ideological treatment of adult education on the part of the government and their policies is being continued (adult education - a relict of Communism) while social attention is in the position characterized by severe economic crisis, political shocks and transition from the former social order to a new one orienting itself to other fields.

The needs for adult education - for all its spheres, topics and functions - are extremely great but remain for the most part unsatisfied. The insight that it is adult education which represents one of the most significant means for social growth and change has not yet penetrated into social consciousness.

Adult education crisis is most noticeable in the stagnation or even retrogression of research activity in most of the countries under consideration. Unless fresh stimulation for the research activity is found again, this field may not find a way out of the present crisis. It is clear that foreign patterns cannot be transplanted onto different social circumstances unless we should at the same time closely examine how they could be introduced into and made suited to the our new context.

The proposals for how to modify the circumstances have been divided into two groups.

## **1. Proposals taken over directly from the national reports and other sources used here**

**1.1.** Adult educators in Central and Eastern European countries should re-examine their roots and learn from their past - from achievements and failures of adult education in their own countries and elsewhere (e.g. from Germany after Second World War or from Portugal after the fall of the totalitarian Fascist order) (Kulich 1994: 2)

**1.2.** It is urgent to make immediate steps to prevent further destabilization and to give people opportunity for investing their work in their own country. The help needed in these countries is in particular: appropriate equipment and qualification, transfer of methods and skills, counselling, exchange of experience, help to establish an adult education network, and in particular to provide them help for self help. (Cooperation 1992: 168)

**1.3.** Research work in the new social circumstances will require wholly new theoretical competencies and research qualifications (MALEWSKI 1992). Some other findings made by the authors of the studies about help needed:

- it would be necessary to obtain financial help from international organizations to maintain the already achieved quality of research work;
- to develop an information system on the level of European standards;
- to keep lists of research workers and research themes from Europe;
- to develop international co-operation;
- for developing the physical and material existence (technology, handbooks, teaching aids, financial means), and man's (methodological) help (in implementing programmes and utilization of teaching techniques, in developing relations with the public).

**1.4.** To strengthen the organization of partners for speeding up and for financing of the research in adult education; such a partnership and division is required by market economy principles.

**1.5.** To introduce international projects within which countries interested could become included, in conjunction with them it would be possible to make comparative studies of adult education and the findings of the research would stimulate the development of individual fields and adult education questions

**1.6.** “It will have to be national actors in each of the countries concerned who develop their own, original modernization concepts and secure the capacities and societal support for their implementation; special attention should be paid to: the dissemination of information and documentation, to stimulating of international contacts, to reconstruction of professional and multi-disciplinary research and development of infrastructure” (Grooting 1991:9)

Individual countries have developed examples which could well be followed up, or in other countries applications have been developed; some of them we mentioned in our report, when we described research and developmental projects, institutions, training of adult educators, administration, legislation and other kinds of development of concept and system of adult education.

## **2. Our Concluding Thoughts and Proposals for Possible Solutions**

And at the end I may be as the author of the present report, permitted to offer some of my proposals for the improvement of the present state.

**2.1.** The states that we have been treated in our report deserve our help in adult education and within this framework also for developing research work.

**2.2.** It would be wrong to think that the Central and Eastern European countries can be helped merely through providing them with the insights gained so far, with models developed in other countries or with patronage over how such plans prepared outside a particular country are here implemented. The countries in question will first have to help themselves: they will have to look for their own ways out of the crisis, they will have to seek for their own ways out of the crisis as they also themselves differ in their particular economic, cultural and other kinds of development as well as in the specific kind of their social circumstances. But it is also true that they themselves, without any help, will not be able to cope with the exacting tasks to improve adult learning and education and to develop more extensive and more intensive research work in this direction. There seem to be two ways of how it would be possible to help:

- a) they should strengthen their international co-operation and together - with each country itself endeavouring to make use of all its internal possibilities - work out a programme for overcoming the crisis and to make an agreement on how to implement it;
- b) they should be given appropriate technical and material help from other, in particular developed, countries in international organizations which would direct a part of their plans towards helping the Central and Eastern European countries.

**2.3.** In the implementation of the programme of the overcoming of crisis we can see in particular the following possibilities:

\* To stimulate or, where necessary, to revitalize the development of the adult education profession. Only in this way adequate technically conceived activities can be ensured, and these must be directed also at influencing the general policy and the systemic organization of adult education in individual countries.

\* To stimulate interconnections among researchers of adult education and to develop their associations in individual countries.

\* To stimulate through special projects the study and the development of legislation concerning adult education; in this respect to make use of favourable experience of individual countries which have already started introducing new legal solutions.

\* To stimulate both individual research workers as well as the associations and institutions in which they work to co-operation in international and interstate networks, associations, and organizations, such as ESREA and EAEA. Such a co-operation should be carried out on an informal basis; financial means for their operation to be gathered through membership fees of individual organizations, grants or subsidies from states, through special development funds founded in developed countries and through special foundations, like e.g. Soros. Also international organization, like UNESCO, should here make contributions from their funds.

\* In the European Community a special programme (fund) for promoting the research of adult education in Central and Eastern European countries should be founded; these means could be made available exclusively for organizations concerned with research and development. Through this fund it would be possible to promote the development especially of those research programmes that in the Central and Eastern European countries do not enjoy support because of being less interesting for the market but are otherwise significant for the development of adult education in the function of the development of the individual and the society.

\* To start funds for the developing of research workers; for younger researchers (after the pattern of Slovenia); and for post-doctoral studies; such funds are to be spread up in individual countries, and also it is necessary to introduce an international form of their organization (foundation).

\* To examine the cases of individual countries which have already found a way out of the crisis in order to offer a model to others who might - if this should not be at variance with their individual ways and circumstances - use them for overcoming the crisis in their own country.

\* To stimulate the interest of the states in the research of adult education; to ensure the co-ordination of interests of various branches in such a way that the ministry most interested in the development of the field would take over the function of the co-ordinator.

\* To stimulate the development of infrastructure (data processing, technical sources, publications, publishing activity, counselling) both in particular countries and through inter-state institutions.

\* For the development of the mutual co-operation in Central and Eastern European countries it is necessary to qualify one of the already operating institutions in one of the countries under consideration. It is more expedient if such an institution is found in area where adult education and related research are already comparatively well developed and where they enjoy a comparatively favourable status. It would be most purposeful to set up such a centre in a state which has a geographically favourable, i.e. central, location and which would be with its internal and foreign policy comparatively well acceptable for most of the countries; such a centre should become a constituent part of the organizational network of EAEA or ESREA.

\* It would be necessary to develop suitable forms and programmes of training for the top staff in scientific institutions. Since individual countries would not be in a position to found and maintain such a centres or programmes and this might not be appropriate, it would be rather more purposeful if such a training was organized jointly for all the countries interested, e.g. in the above described centre for the development of adult education.

\* To insure for all the countries the possibility of having equal rights in the co-operation in the development; this should be done in a way that the individual research themes or fields and topics of adult education are on the basis of joint agreement entrusted to individual countries according to their comparative advantages and competency for dealing with the selected field or topic.

\* To design and stimulate the network of professional meetings dedicated to individual research topics (research networks), which could be further integrated within the existing research networks (e.g. ESREA).

\* To appoint in each country a national co-ordinator for the development and research of adult education.

We conclude our report with the recommendation to UNESCO and ESREA that as the initiators of the present research and of our report they work out their attitudes towards the views and proposals voiced here and that they adopt appropriate conclusions leading to the realization of the possibilities envisaged.



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## Overview of Research Trends in Adult Education in Canada

A Canadian Contribution prepared by  
**L'Institut canadien d'éducation des adultes**  
with the collaboration of  
**The Canadian Association for Adult Education**

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## Foreword

In preparation for the UNESCO 5th International Conference on Adult Education, scheduled to be held in 1997, the UNESCO Institute for Education is putting together documentation on developments in adult education. To this end, it began a project to analyze research trends in adult education throughout the world.

The Canadian Commission for UNESCO was asked to implement the project in Canada on two fronts: to prepare the Canadian contribution and to organize the September 1994 seminar which brought together specialists from various parts of the world. For the Canadian contribution, the Commission enlisted the expertise of the *Institut canadien d'éducation des adultes* (ICEA) and its English-speaking partner, the Canadian Association for Adult Education (CAAE).

The ICEA, under the direction of its president, Université de Montréal Professor of Andragogy Madeleine Blais, began work on the Canadian contribution. First, adult education professors from French-speaking universities in Quebec were invited to take part in a seminar during the May 1993 meeting of the *Association canadienne française pour l'avancement des sciences* (ACFAS). The list of professors who presented papers at the event appears in Appendix 1 of this report.

Second, Professor Blais summarized the papers in order to draw a profile of the situation in Quebec. Then professors from several universities elsewhere in Canada were asked to give papers on research trends in adult education in their province or region. These papers were presented in June 1993, at the annual meeting of the Canadian Association for the Study of Adult Education (CASAE/ACEEA). A list of the papers and their authors appears in Appendix 2.

Since the ICEA was concerned with extending the study to other settings in adult education, the third step was to hold a seminar (in June 1993) to examine research done by community-based and trade-union sectors and by the Quebec government, and to learn of their concerns about emerging problems. The seminar report gives an overall view of the contributions and concerns of these sectors with respect to adult education research. It is kept at the *Centre de documentation en éducation des adultes et en condition féminine* (CDEACF), in Montreal.

As a final step, the partners responsible for organizing the June 1993 seminar — the Canadian Association for Adult Education (CAAE), the *Institut canadien d'éducation des adultes* (ICEA) and the Canadian Commission for UNESCO — went on to engage a researcher to conduct a broader consultation with Canadian individuals and organizations. The list of organizations contacted is presented in Appendix 3. Supplementary sources were also consulted to expand on data gathered in the first stages.

Despite the breadth of these initiatives, which were completed in 1994, we cannot claim to have conducted an exhaustive study on the state of adult education research in Canada. The document reflects the work and concerns of various sectors and provides a general overview of current trends. Additional studies will be required to achieve a greater level of detail.

## Introduction

Over the years, the *Institut canadien d'éducation des adultes* (ICEA), the Canadian Association for Adult Education (CAAE) and the Ontario Institute for Studies in Education (OISE) have charted the progress of Canadian research in adult education. In the same spirit, this report attempts to describe the main trends in research done in Canada on the subject, while stopping short of compiling an exhaustive list of all relevant publications. The field of adult education includes a wide variety of areas of study and practice, giving rise to many publications that, while closely related to adult education problems, are not necessarily identified as such.

The report was written with the co-operation of a consultative committee of experts representing the partner organizations responsible for organizing the September 1994 seminar. Brief definitions of the primary concepts used in adult education research are presented, followed by an overview of the Canadian socio-economic and cultural context. The various adult education research settings are then identified, with a description of the kind of research done in each : the university milieu, the trade union and community-based sectors in Quebec and Canada, government departments, public bodies, commissions of enquiry and task forces.

In the last section, the report addresses the issue of research funding and then examines major current trends in Canadian research, along with some of the most important subjects researchers are dealing with.

### A few definitions

Before going any further, we believe it is useful to define two terms that recur frequently throughout the document: research and adult education.

#### **Research**

To understand more fully the present state of research activity, we would do well to define what we mean by «research» in adult education and by its «products». The term «research» gives rise to a large number of definitions. Legendre (1993) suggests an interpretation limited to three general criteria: the rigour of the approach, the systematization of the process and the recording of results. Thus a common process, characterized by an effort to systematize it and by the production and dissemination of a report, ties together the different epistemological, theoretical and methodological systems employed by researchers.

Major differences exist among types of research, their epistemological values and the nature of the resulting reports. To reflect this diversity, it is essential to include as many approaches and methods as possible rather than limiting the analysis to one or a few. The point, then, is not to examine the legitimacy of some approaches to the detriment of others but to recognize each one's contribution to the advancement of adult education in Canada.

#### **Adult Education**

In 1976, the member states of UNESCO adopted the following definition as part of a recommendation on the development of adult education:

*The entire body of organized educational processes...whereby persons regarded as adults by the society to which they belong develop their abilities, enrich their knowledge, improve their qualifications...*  
(UNESCO, 1976)

This definition includes a wide array of educational activities, many of which take place outside educational institutions. As a field of activity, adult education is not confined to educational practices strictly identified as such, in literacy centres or in secondary or higher education institutions. Many human resources managers in business, for example, would never use the term «education» to describe their training activities. The work of community action groups in cities, rural areas or aboriginal communities is rarely identified as educational activity. Trade union action and steps taken to bring about



self-management by workers in industry are other examples of educational activities rarely associated with the term adult education.

In some circles, the term *andragogy* is used to denote all fields of study and practice related to adult education. It seems, however, that the term is sometimes associated more with an educational method for adults. In fact, the notion of adult education covers such a vast field and encompasses so many different realities that many in the field, be they researchers or practitioners, do not associate their activities with it. They are likely to use more specific terms, such as continuing education, vocational training and andragogy. For the purposes of the present document, we define adult education in the broad sense, in the spirit of the definition put forward by UNESCO (1976), and with respect for the views of the Canadian individuals and organizations that we consulted.

### **The Canadian Socio-economic and Cultural Context<sup>9</sup>**

We live in times of great upheaval, marked by expansion of the market's sphere of influence and by dazzling progress in science and technology. Unfortunately, the benefits of scientific progress are far from being equally shared. Indeed, the number of people excluded from sharing in the benefits seems to increase at the same pace as technological change. A growing segment of the population, especially youth, live in poverty and an atmosphere of uncertainty and insecurity regarding jobs and their future. Added to this insecurity are anxieties stemming from a crisis in values and from changes in lifestyles and social relations within the family and Canadian society.

While it is true that the industrialized countries are experiencing a period of unprecedented crisis, we should also bear in mind that this is more a period of change than of mere passing disturbances: we have moved from an industrial society to one based on information. In the new society, knowledge is the main factor of growth, while technological progress is converting the mass production economy into an economy centred on knowledge, research and innovation.

In the context of economic globalization, professional skills and access to information and knowledge constitute the strategic asset for countries, like Canada, in which population densities are low. Designating vocational training as the miracle solution to the problem of unemployment is but a step further, one that business and political decision makers have been quick to take.

Although vocational training is an important key in facilitating access to the job market and making businesses more competitive, the current employment situation cannot be attributed solely to a lack of training. The problem stems much more from the fact that new technology has eliminated many more jobs than it has created. After first eliminating a large part of manual labour, technology is now doing away with an increasingly important segment of intellectual work.

### **The Transformation of Jobs and Training and the Role of the State**

Economic restructuring and technological change, which are being pursued at a fast pace, have contributed to transforming the world of work. Such major, rapid changes force businesses and educational institutions to devote considerable effort to innovation and adaptation in the areas of training, research and production. The changing nature of jobs simultaneously produces both an increased demand for workers with post-secondary education and a growing supply of insecure, unstable jobs requiring few qualifications.

The sharp increase in both types of job has produced a real polarization of the labour market. Current occupational and vocational training policies contribute to such a polarization inasmuch as they have taken two main directions: one centred on qualification training (leading to formal accreditation) and the other on employability measures (aimed at rapid integration into the labour market, with or without training).

Reduction in the role of the state, and the fact that governments subordinate their policies to the requirements of economic growth, are at the core of the imbalances affecting our societies today, with

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<sup>9</sup> This section of the document draws upon numerous sources, notably ICEA (1994a) and Rubenson (1987).

particularly devastating effects on the educational system. The neoliberal orientation of our governments has relegated the raising of living standards and reduction of inequality to the rank of desirable corollaries.

Governments are directing their interventions toward target populations while imposing increasingly restrictive control measures on individuals. The effect of the target-*clientèle* approach, linked to successive cuts in public spending, is to call into question the principles of access and universality put forward by the welfare state.

Similarly, instead of actively supporting economic development by creating new jobs and reducing regional disparities, the neoliberal state merely «accompanies» development, leaving primary responsibility for the latter to private enterprise and market forces. Thus, in the field of training, governments support businesses directly by implementing human resources development measures and facilitating the creation of private training firms. This situation leads educational institutions, which are increasingly subject to the law of the market, to behave competitively.

### **Social and Cultural Change**

Until recently, the social and cultural dimensions of the changes we are experiencing have been overlooked. Economic issues have absorbed all of the public's attention, and it is always difficult for people to discern the broad trends underlying apparently contradictory and paradoxical events. Analysis of the repercussions of change on the organization of life within society, on lifestyles and value systems has only just begun.

Other important phenomena are not receiving the attention they deserve. This is particularly true in the case of the effect of the women's movement on social organization as a whole. Steps taken by women toward financial and occupational autonomy give rise to specific training and retraining needs. Since their work has received little acknowledgement, women have striven to obtain recognition of their prior learning experiences. Their demands have led to the development of new approaches in education, relating, for example, to the recognition of the worth of general skills stemming from experience, with the aim of fostering access to study and work.

Demographic change, aging and the increasingly multiethnic nature of the population are all factors giving rise to new needs for training and new sources of social inequality.

### **Social Participation**

The relationship between society and the individual is marked by profound imbalances and paradoxes, as is the relationship between the socio-cultural and socio-economic dimensions of society. The disengagement of the state and growing privatization of public services mean that the exercise of citizens' rights, including the right to education and information, will depend increasingly on people's ability to pay. People with insecure jobs or no jobs are not only excluded from work; they are also deprived of the right to participate in the social, political and cultural life of society. As a result, citizens' influence on the organization of social life is dwindling. Individuals and local and regional communities will be called upon to take fuller charge of their own development and to rely less and less on the state.

In popular and community organizations, learning about citizenship and democracy is traditionally rooted in concrete practices. These organizations also provide an excellent place for people to experiment with new social relationships, rekindle solidarity and promote the emergence of new forms of social action to counter exclusion. Unfortunately, state recognition for the contribution made by these groups is waning: «As symbols of the will to broaden autonomous democratic spaces, community groups are confronted with a double exclusion: their marginalization as a social force, and the exclusion of the persons they defend, whose rights are subject to the same double standard that characterizes the dual society» (*Forum de la solidarité sociale*, 1994).

### **The Omnipresent Media**

The omnipresence of the media in the lives of individuals and communities is another issue that people engaged in adult education, including researchers, must address. Not enough attention is paid to the influence of the media and their growing place in our societies. During their lifetime most North Americans

will devote more time to watching television than to their paid job, while youngsters spend less time in the classroom than in front of the small screen.

Television represents the main source of recreation and information for the population, regardless of generation. Its omnipresence vests it with a determining influence over the ways we live and think. The media as a whole constitute a de facto «parallel school», and it is becoming urgent to raise awareness of the progressively closer links being forged between the quality of social life and the quality of the content they present to the public.

### **Major Issues for Adults and Society**

As this century draws to an end, changes affecting all spheres of human activity force us to rethink the overall mission of the educational system, as it relates to young people and to adults, and to re-examine its position in relation to other social institutions.

Economic growth and technological development have never been the sole guarantors of progress for humanity. The discrepancy between the fabulous potential of new technology and the uses to which it is put demonstrates that the «social contract» has been broken. The problem lies not so much in the gap between the training offered by educational institutions and the needs of the labour market, but in our inability to teach the skills needed to deal with the realities and new requirements of life in society. From now on, everyone must be given the opportunity to have a hand in change, and not only to submit and adapt to it.

Intellectual activities of a more technical and mechanical nature will be performed increasingly by computers. Because knowledge is evolving rapidly and is increasingly accessible through computer technology, initial training should consist far less in imparting knowledge than in instilling a solid basic education and general culture centred on creativity, autonomy and ongoing self-training. The importance of information in all areas of human activity will require the educational system to teach new skills, including the ability to find, process and analyze needed information, and to make critical judgements.

The educational system alone cannot meet all these challenges. Education, particularly for adults, is a responsibility that should increasingly be shared among a variety of institutions, given the growing interdependence that now links education, information, work and democratic life. Since knowledge and technology never stop progressing, individuals will be forced to constantly update their knowledge and technical skills. Continuous training and adult education will therefore take on added importance.

These changes and the issues they raise have radically altered the adult education environment. Moreover, the speed with which present socio-economic changes are occurring constantly gives rise to new issues that create new challenges for the entire adult education network, researchers included. Thus it is important to take stock of the state of research in the field. One question to ponder is: should research precede, support or follow the implementation of practices and policies?

### **Research Settings**

The sphere of research is extremely diversified, and this is particularly true of research in adult education. Universities, associations, community and trade union organizations, government departments and agencies, commissions of inquiry and task forces have all concerned themselves with this field. The following pages provide a brief description of these different environments, the kinds of research being done and the means used to disseminate it.

#### **The University Milieu**

In Canada, adult education was recognized as a university field of study and research in 1958, when the first complete master's program was set up at the University of British Columbia. Other programs were instituted in rapid succession at the Ontario Institute for Studies in Education (OISE), Université de Montréal, University of Saskatchewan and Saint Francis Xavier University, in Nova Scotia.

Today, 27 institutions offer courses or programs in adult education. Some only give courses as part of more general training in education, whereas others provide complete bachelor's, master's and even Ph.D. degrees.

Undergraduate programs, most commonly leading to a 30-credit certificate, are offered in some 15 institutions. As of 1994, graduate programs are varied and include certificate programs, Master of Arts (M.A.) and Master of Education (M.Ed.). Doctoral studies can be done in French in one institution in Quebec and in English in three institutions in English-speaking Canada<sup>2</sup>.

Research-oriented programs are of three types: M.A.; M.Ed., for which a thesis or supervised work is required in some universities; and doctoral (Ph.D.).

Since institutions offering graduate studies in adult education are the main research and training settings, we shall describe them briefly: first, those on the Pacific Coast, followed by those in the Prairie provinces, Ontario, Quebec and the Atlantic provinces.

In **British Columbia**, four universities offer studies in adult education: Simon Fraser University, the University of British Columbia, the University of Victoria and the Open Learning Institute. Only the University of British Columbia offers a master's and doctoral program in adult education. Although the two others only offer undergraduate courses, they have professors who do research in the field (Rubenson, 1994).

In **Alberta**, two universities, the University of Alberta and the University of Calgary, offer a master's program in adult education.

In **Saskatchewan**, the University of Saskatchewan offers graduate programs in adult education: a certificate and master's degree in continuing education. Some 40 % of the students enrolled in the master's program choose to write a thesis. At the University of Regina, a number of students in the Master of Education program are doing research in adult education (Blunt, 1995).

Of the three universities in **Manitoba**, only the University of Manitoba has a master's program in adult education, created just a few years ago (Kops, 1995).

In **Ontario**, close to half the universities have departments of education in which programs are centred on the training of primary and secondary school teachers. At these universities, research in adult education is generally done in social science departments and in departments such as medicine, engineering, etc. The Ontario Institute for Studies in Education (OISE) is the only institution<sup>3</sup> that offers master's programs (M.A. and M.Ed.) and an Ed.D. program in adult education (Burnaby, 1995).

**Quebec** has 12 universities, three of which are English-speaking. Four offer complete higher education programs in andragogy or adult education. The Université de Sherbrooke, the Université du Québec à Hull and the Télé-université offer certificate programs, whereas the Université de Montréal has two master's program (M.A. and M.Ed.) and doctorate in andragogy. As is the case elsewhere in Canada, in a number of Quebec universities it is possible to conduct research in adult education as part of a study program in education (Blais, 1995).

As of 1994, degree programs in adult education are offered in the four **Atlantic provinces**. The University of New Brunswick offers an M.Ed. in Adult Education; of the approximately 80 students enrolled, about 15% write a thesis (MacKeracher *et al.*, 1995). Saint Francis Xavier University (Nova Scotia) has an off-campus master's program specializing in adult education; it recruits students from all over Canada and parts of the United States (MacKeracher *et al.*, 1995). Finally, Dalhousie University receives master's (M.A. and M.Ed.) and doctoral students.

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<sup>2</sup> In English Canada, doctoral studies in adult education are offered at the University of British Columbia, the Ontario Institute for Studies in Education and the University of Dalhousie. In Quebec, the Université de Montréal offers a Ph.D. program with an option in andragogy.

<sup>3</sup> The Ontario Institute for Studies in Education offers graduate studies in education theory in association with the University of Toronto. Apart from adult education, its internal departments include applied psychology, curricula, education administration, higher studies in education, history and philosophy of education and sociology of education» (Burnaby, 1995).

The viability of all these programs, which were apparently well established in the early 1980s, is fragile<sup>4</sup>. For a few years now, universities have been subjected to major budget cutbacks; some have reacted by paring down departments or eliminating programs. The University of British Columbia was the first (around 1985) to merge its Department of Adult Education with the Department of Administration and Graduate Studies in Education. In 1987, the Université de Montréal also proceeded to restructure its Faculty of Education, and merged Andragogy with Educational Psychology. The University of Saskatchewan did the same in 1993. Restructuring at these two universities resulted in the dispersal of some of the teaching staff. In 1994, the University of British Columbia, the University of Alberta and the Ontario Institute for Studies in Education (OISE) all announced similar changes.

The elimination of programs is another threat. Memorial University, in Newfoundland, did away with its master's program in adult education several years ago. In the spring of 1994, Dalhousie University announced that it was closing its Faculty of Education and, with it, the two master's programs (M.A. and M.Ed.) and the only Ph.D. program in adult education in the Atlantic provinces.

These mergers and closures cause considerable tension, with professor-researchers in adult education feeling marginalized and under-valued in their daily activities. Tension is intensified when cutbacks appear to involve a reassignment of professors interested in adult education, to the advantage of other programs or other professors in search of clients. This kind of tension also has consequences for students, who often find, for example, that to complete their studies in adult education they must accept being taught and supervised by professors whose specialty, until recently, was teaching young people.

Although units specialized in the field facilitate research in adult education or andragogy, they are not the only places where such research is done. Researchers interested in the problems of adult education may be found, for example, in the Institutional Research Service of the Department of Continuing Education at the University of Calgary and the Studies and Development Office in the Faculty of Continuing Education at the Université de Montréal (Therrien, 1993). To better fulfill their mandates, these units carry out client surveys, analyze the performance and progress of programs, do market studies and so forth.

Research is also done in specialized departments whose mission is to meet the needs of individuals and groups in the surrounding area and to support community development. Two examples are the extension services of community colleges and the *Services aux collectivités* of the Université du Québec à Montréal.

Finally, professor-researchers and students doing research on problems related to adult education are found on occasion in the following schools and departments: communications, counselling and guidance, rural studies, nutrition, psychology, philosophy, industrial relations, sociology, sexology, engineering, medicine, social work, nursing and administration. While these researchers do not necessarily identify their work with adult education, they contribute to enriching this body of knowledge all the same.

Such a dispersion of places of research reflects the boom in both study and practice. It is beneficial in terms of broadening knowledge, but it does pose certain problems. In a number of universities it prevents the establishment of a critical mass of researchers that is indispensable to the rapid progress of any research program.

Another trend that undermines the ability to produce research in university settings is the increasingly frequent use of lecturers, whose only responsibilities are to prepare and give the courses for which they are paid, and to mark papers and assignments. In small numbers, they are certainly an asset for students enrolled in vocational training programs, because they have practical and up-to-date experience in the field. However, the massive use (close to 50 % in some places) of lecturers, instead of career professors, threatens the coherence of programs and research.

### Training of Researchers

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Tom Sork (1993) has done an extremely interesting study on programs offered in Western Canada. He identifies factors that make these programs vulnerable.

Universities are not the only places that train researchers. Many researchers, even today, choose to train on the job, often by joining research teams. Others decide to enroll in research-oriented programs, usually conducting research alone, under the supervision of a research director. In the past few years, however, due to the policies of granting agencies — particularly the *Fonds pour la formation de chercheurs et l'aide à la recherche* (FCAR) in Quebec — student researchers have been able to join research teams which are often multidisciplinary. Such teams exist at the Université Laval the CERDEC (Research Centre on Career Development)<sup>5</sup> and the GRIIP (Inter-university Research Group on Customized Programs)<sup>6</sup>; at the Université de Sherbrooke the CRET (Research Centre on Education and Work)<sup>7</sup>; and at the Université de Montréal the GRAM (Interdisciplinary Research Group on Learning in Museums)<sup>8</sup> and the GIRAT (Interdisciplinary Research Group on Self-learning at Work)<sup>9</sup>.

Whether they belong to a research team or not, student researchers can obtain scholarships to help them pursue their full-time studies. In some institutions, they also have access to internal funds.

### **Dissemination of Research and Collaboration among Researchers**

The means for disseminating Canadian research in adult education are varied, but insufficient. We will try to show this without pretending to be exhaustive.

To foster the development of research in their field, adult education researchers and professors founded the Canadian Association for the Study of Adult Education (CASAE/ACEEA) over ten years ago. CASAE is a member of the Learned Societies and the Social Science Federation of Canada. In addition to a news bulletin, it publishes the *Canadian Journal for the Study of Adult Education*, which mainly contains research reports written in one of the country's two official languages.

Canadian researchers publish the results of their work in many other scientific and professional journals in Canada, the United States and Europe. Yet for a number of reasons, not all research is published. First, to be published, articles must be accepted by review boards, which are the watchdogs, so to speak, of scientific quality in journals. This process, which often takes a long time, tends to eliminate articles that do not meet the traditional criteria of scientific publishing. What is more, a great number of articles await publication in journals that come out very infrequently, with the end result that an article may take as long as two years to appear. To offset this disadvantage, CASAE proposed, during 1985-87, the creation of an electronic journal, an idea that unfortunately went nowhere. No doubt it was ahead of its time: under current circumstances this type of project is now possible.

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<sup>5</sup> CERDEC's (*Centre de recherche sur le développement de carrière*) scientific program comprises four parts: adjustment strategies, educational programs and career counselling, structural counselling and career development policy. Examples of specific projects are study-work transition, aging of the active population and adult education, and women's career development (Nadeau, 1993).

<sup>6</sup> GRIIP (*Groupe de recherche interuniversitaire sur l'individualisation des programmes*) concentrates on problems associated with customized programs, such as the development of autonomy and learning styles (Nadeau, 1993).

<sup>7</sup> CRET (*Centre de recherche éducation et travail*), under the direction of Pierrette Dupont, examines problems related to school-work transition among youth and adults, employability, and the relation between theory and practice.

<sup>8</sup> The GRAM (*Groupe de recherche sur l'apprentissage muséal*) under the leadership of Colette Dufresne-Tassé, explores the adult's intellectual and emotional functioning in situations of spontaneous learning (Blais, 1993).

<sup>9</sup> An initial research group called GRAAME, directed by Nicole A> Tremblay, explored different aspects of self-learning in educational settings. Its successor, GIRAT (*Groupe interdisciplinaire de recherche sur l'autodidaxie au travail*), is interested in self-learning in work settings (Blais, 1993).

Dissemination of research takes place mainly when researchers attend the large conferences held annually in Canada and elsewhere. The Canadian Association for the Study of Adult Education (CASAE/ACEEA), for example, holds an annual conference, as does the Canadian Education Association (CEA). The Adult Education Research Conference (AERC) and the American Association for Adult and Continuing Education (AAACE), although based in the United States, hold their annual conferences in a different part of Canada every four years. Researchers in Western Canada are especially active in the AERC. Among French speakers, the annual meeting of the *Association canadienne-française pour l'avancement de la science* (ACFAS) is a preferred venue. Papers presented at all these conferences are usually published in proceedings that are then itemized in the main data banks.

There are also a number of networks of researchers and practitioners who have their own means of making their work known. For example, the Canadian Association for Distance Education publishes a periodical entitled the *Canadian Journal of Distance Education*, and the Canadian Association for Adult Education (CAAE) puts out *Learning*. The same applies to researchers and practitioners in university departments or faculties of continuing education.

Finally, the Internet, which has spread rapidly throughout the United States, Canada and the rest of the world, permits the creation of networks among a large number of researchers. The Internet enables professors and researchers throughout the world to exchange information easily and quickly. Thanks to the Internet, Canadian researchers and practitioners in adult education now have an electronic bulletin board managed by the University of Regina. It is a tool for discussion, and facilitates closer ties among Canadian researchers in adult education.

### **Government Departments, Public Agencies, Commissions of Enquiry and Task Forces**

The public sector, federal as well as provincial, has produced a large body of research, surveys, studies and analyses on adult education, vocational training, the mass media, the impact of new technologies and labour market development.

#### ***Government Departments***

Just as the adult education sector is characterized by certain grey areas («education» versus «training»), with both social and economic objectives, the government departments that have conducted and/or funded research projects, surveys, studies and analyses are motivated by concerns that are in some cases social and in others economic.

The Canadian Constitution grants the provinces full jurisdiction over education. Thus, it is not surprising that provincial departments of education and higher education, as well as colleges and universities, have carried out or commissioned research in adult education. The federal government, theoretically excluded from this jurisdiction, has nevertheless played a major role, particularly through grants and commissions. This has traditionally been the role of the Department of the Secretary of State, which later became the Department of Multiculturalism and Citizenship and more recently, of Canadian Heritage. In some sectors, there are even public agencies directly identified with a particular field, such as the National Literacy Secretariat.

Given the importance assigned to economic objectives, and consequently to vocational training, the federal and provincial departments of labour, employment, income security, manpower or vocational training and human resources development have also been active in producing or sponsoring research projects, surveys or studies on vocational training, acquisition of skills, labour market development and technological change.

Since the mid 1980s, Employment and Immigration Canada (now Human Resources Development Canada) and the provincial departments in charge of vocational training have seen their sphere of influence grow in the field of adult education, while that of the departments and ministries responsible for education has diminished. Economic departments have seen their human and financial resources increase, enabling them to perform or commission research on different aspects of vocational training or employability development. However, access to data banks and the findings of such research is often restricted.

The major role played by Statistics Canada since 1984, through national surveys on adult education and training, must be emphasized. These surveys, now undertaken every other year, are designed to give a detailed picture of adult education activities.

### ***Advisory Bodies***

Since the 1960s, the Economic Council of Canada<sup>10</sup> has produced or commissioned research and issued opinions on the economy's development and trends. In many cases, though to different degrees, these documents have affected vocational training policies and programs. Following the reforms that marked the second half of the 1980s, new consultative bodies were created by Employment and Immigration Canada: the Canadian Labour Market and Productivity Centre (CLMPC); and the Canadian Labour Force Development Board (CLFDB), which set up regional structures. These bodies were created to carry out major studies and make recommendations to governments. The CLMPC, for example, produced a national survey in 1991 on training practices in the workplace.

In Quebec, the *Société québécoise de développement de la main-d'oeuvre* (SQDM) plays the same role: it comes under the Quebec Department of Employment without any direct link to the CLFDB. The SQDM and its regional bodies (which replaced the former vocational training commissions) are also called upon to produce studies and analyses in each region of Quebec. Given its direction, the SQDM emphasizes the adaptation of workers to the needs of the labour market.

In the provinces, mainly in Ontario and Quebec, several sectoral bodies have also produced research reports, surveys and studies on adult training needs. These include Ontario and Quebec councils on the status of women. The Canadian Advisory Council on the Status of Women (CACSW) plays a similar role at the national level.

Quebec has also created the *Conseil supérieur de l'éducation*, which has produced detailed analyses and issued opinions on various topics in the field of adult education. Since the abolition, in 1993, of the councils of colleges and universities in Quebec, it is the province's only remaining advisory body on education. Through its Adult Education Commission, it is one of the only consultative bodies that has retained a mandate to examine the overall field of adult education. In Ontario, the Premier's Council has commissioned research and studies in the field of vocational training.

Although incomplete, this list of advisory bodies which have produced or commissioned research projects, studies and analyses on different aspects of adult education shows the importance that adult education policies and research have acquired over the last ten years, particularly in the area of vocational training.

### ***Commissions of Inquiry and Task Forces***

Since the late 1970s, several federal commissions of inquiry and task forces have been set up to address issues such as educational leave, adult training and labour adjustment:

- ! The Commission of Inquiry on Educational Leave and Productivity (Adams *et al.*, 1979);
- ! The Parliamentary Task Force on Employment Opportunities for the 1980s;
- ! The Task Force on Labour Market Development (1980);
- ! A three-step operation that began in late 1982 — the Skill Development Leave Task Force (1982), the national seminar on the Task Force's report (1983) and the National Advisory Panel on Skill Development Leave (1983);
- ! The Advisory Council on Adjustments (1988).

Several of these commissions produced or funded a large number of research papers and studies. The Commission of Inquiry on Educational Leave and Productivity financed seven research papers on educational leave or on employee training and development. The Task Force on Labour Market

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The Economic Council of Canada was abolished in the early 1990s.



Development (1980) commissioned 36 studies and analyses, while the Skill Development Leave Task Force commissioned 33 documents on various aspects of adult training.

### **Non-Institutional Research Settings**

Adult education in Canada stems largely from the concerns and initiatives of social movements during the interwar period and the Great Depression. From the very beginning, it formed part of a community organizing and social justice movement that has survived its gradual institutionalization. However, this characteristic of adult education has tended to disappear as it is subjected to the primarily economic priorities of government policies.

Until the 1960s, adult education remained almost exclusively extracurricular and non-formal. Its main functions were: filling gaps in basic education (e.g. the Reading Camp Association, which became Frontier College in 1902, teaches literacy to workers); supporting movements for justice among particularly deprived social groups (e.g. the National Farm Radio Forum, for farmers); or participating in the development of alternative economic projects (e.g. the co-operative movement in Quebec or the Antigonish movement in Nova Scotia).

The main adult education associations that still unite the major organizations in this sector were founded in the 1930s: the Canadian Association for Adult Education (CAAE), in 1935, and its French Canadian counterpart, the *Société canadienne d'enseignement postsecondaire*, which became the *Institut canadien d'éducation des adultes* (ICEA) in 1956.

Prior to the institutionalization of adult education, these organizations were the main centres of research on the subject. They still continue to analyze major social issues in adult education and to represent the perspective of social groups that are neglected by the educational system or ignored in educational policies. Such concerns are largely overlooked in institutional research, which is more focused on the educational system's organizational objectives.

A distinctive feature of these organizations is that they approach research and action with a broader vision of adult education: one that takes into consideration the range of adult needs and places of training. Their work covers formal education in teaching institutions as well as non-formal education provided through community involvement and the media. The CAAE, ICEA and Ontario Institute for Studies in Education (OISE) were the first to publish joint research surveys on adult education in Canada.

Other networking organizations with a research mandate were founded in the 1980s, particularly in response to the evolution of women's issues. The Canadian Congress for Learning Opportunities for Women (CCLOW), the *Réseau national d'action et d'éducation des femmes* (RNAEF), the Canadian Research Institute for the Advancement of Women (CRIA-W) and *Relais-femmes* are major centres focusing on research needs related to «women and education», in partnership with university centres and through independent research.

The contribution of labour- and social policy-related bodies, such as the Canadian Council on Social Development (CCSD), must be emphasized. Their studies often deal with training.

Adult education research is also carried out by community organizations specialized in promoting non-formal education and supporting popular education. The *Mouvement d'éducation populaire et d'action communautaire du Québec* (MEPACQ), the *Regroupement des groupes populaires d'alphabétisation du Québec* (RGPAQ) and the *Collectif québécois de conscientisation* (CQC), all in Quebec, as well as the *Fédération canadienne pour l'alphabétisation en français* (FCAF), the Movement for Canadian Literacy, the Participatory Research Group and the Doris Marshall Institute for Education and Action, elsewhere in Canada, have undertaken research projects to define training needs, encourage new practices, train teams of educators or study government education policies. Providing leadership to grass-roots networks, these organizations play a major role in the dissemination of practices and research through their journals and newsletters, or by creating documentation centres such as the Fora Centre in Ontario and the *Centre de documentation en éducation des adultes et en condition féminine* in Quebec.

Finally, the important pool of community and workers' organizations occasionally produces research on adult education and major areas of training. Organizations representing minority groups, such as the *Fédération des communautés francophones et acadienne du Canada* (FCFAC), the vast network

of women's groups, the major community action groups and international development organizations have all produced studies on the educational needs of their sectors, as well as analyses of government policies.

Canadian and Quebec labour centrals have research departments whose mandates include adult education, labour force development, basic training and trade union training for their members. The research and education services of the major sectoral labour federations and provincial or regional labour groupings undertake research to support political action on training issues. Their research also deals with training methods and practices, in support of the many local, regional and national initiatives in which trainers and union officers are involved.

The presence in Canada (Toronto) of the General Secretariat of the International Council for Adult Education (ICAE) has helped to energize research in the community-based sector, by promoting fruitful exchanges through its journal, *Convergence*, and its programs of cooperation with popular education and basic training movements in the rest of the world.

This brief overview of non-institutional actors shows that production of adult education research is not limited to universities, and that these associations play a very important role, despite their minimal resources, in highlighting the social issues of adult education, analyzing government policies, formulating alternatives, and developing and disseminating new educational practices.

In addition to their own contribution to research, their role in the identification of new issues, or approaches to issues, makes them important in opening up new themes or fields of research that can then be taken up by institutional bodies.

In this sense, fruitful partnerships have been created between associations or unions and university researchers: occasional collaboration between research teams and the ICEA or the CAAE, for example, or regular partnerships between universities and organizations, as is the case in Quebec, with agreements between the *Services aux collectivités* of the Université du Québec à Montréal and labour centrals, as well as women's groups (through *Relais-femmes*).

These agreements, which range from a simple research request to joint research projects, give associations access to resources that are difficult for them to obtain on their own. Indeed, their research mandate is hardly acknowledged by governmental funding policies, and their limited operating budgets do not allow them to meet the costs of the research programs their activities require.

Despite the significant and unique contributions of non-institutional organizations to adult education research, the value of their work has yet to be fully recognized. They have limited access to public research funds, and the funding conditions often imposed on them tend to subject them to institutional priorities.

In Quebec, for example, several organizations have been forced to terminate their publications (MEPACQ, RGPAQ) or curtail their production (ICEA), and research organizations (IRAT) or research support groups (*Centre populaire de documentation*) have disappeared, due to a lack of government support for the development of community-based research.

### Research Funding

The funding of research in adult education is no different from that of other research fields; research projects are sponsored or receive grants after being assessed by peers. Before we examine these two types of funding, a few words about «independent» research are in order.

#### «Independent Research»

Most research conducted by students is not funded, except, to some extent, that of Ph.D. students, who, as we saw above, may obtain federal or provincial scholarships.

It appears that a significant proportion of research carried out by professors is not funded, though it is hard to quantify due to a lack of information. Some authors describe this work as «independent research»<sup>11</sup> (Beaucage, 1994; Hébert, 1994) to distinguish it from sponsored research or research funded

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In a recent issue of *Université*, the journal of the *Fédération québécoise des professeures et professeurs d'université*, Beaucage (1994) writes: «The very term 'independent research' shows a

by granting agencies. The reasons such a distinction is being made in university circles will become clear below.

The present state of university research funding is cause for concern (MacKeracher *et al.*, 1995) and has raised a debate, at least in Quebec, over academic freedom (Bouchard, 1994; Braun, 1994; Jalbert, 1994). This debate does not seem to relate to adult education researchers, however, probably because relatively few have benefited from strategic grants or sponsorships.

### **Sponsored Research**

The large number of funding sources for sponsored research in adult education reflects the diversity in this field. Foreign governments or international organizations, like the International Labour Organization (ILO) and the World Bank, have commissioned several studies, such as evaluations of adult training programs, carried out in the framework of community development projects.

Canadian government departments and public agencies are the main sponsors of research in adult education. At the federal level, departments such as Employment and Immigration Canada (now Human Resources Development Canada), the Department of the Secretariat of State (which became the Department of Multiculturalism and Citizenship and, more recently, Canadian Heritage), Labour Canada (now integrated into Human Resources Development Canada), as well as many others, play a primary role. Thus, surveys produced by Statistics Canada on participation in adult education are sponsored and funded by federal departments directly concerned with training or human resource development. Nevertheless, other federal government departments also fund research in adult education. For example, Health and Welfare Canada (now the Department of Health) sponsors studies on training in the health field.

At the provincial level, the main sponsors are departments concerned with education, postsecondary education and labour force development. Bodies attached to these departments also sponsor studies devoted to the improvement of adult education along three main lines: adult participation, organization of adult education and evaluation of policies and practices.

Some municipalities and private bodies — professional associations, unions, companies, sectoral agencies — also sponsor research. Burnaby (1995) mentions research projects conducted by the Ontario Institute for the Study of Education (OISE) and commissioned by the City of Toronto.

### **Research Grants**

The Social Sciences and Humanities Research Council of Canada (SSHRC) is the main federal source of research grants. It is the only body that provides scholarships and grants throughout Canada, and is the most important one to sponsor research on adult education in Canada. This body «oversees the distribution of federal grants for university research and other scholarly activities» in the social sciences and humanities (SSHRC's 1990-91 annual report, p. 9). After health, education is the field that receives the largest share of grants from the Council (almost \$ 3 million in 1991-92). Adult education receives approximately 10 % of this funding (nearly \$ 400,000 in 1991-92).

There is a similar body in Quebec: the *Fonds pour la formation de chercheurs et l'aide à la recherche* (FCAR). In addition, several universities have created internal funds to support the development of research.

Research projects can be funded through regular grants, awarded to one or several researchers, or through strategic grants. Since 1986, the SSHRC has had a «strategic grants» program<sup>12</sup> which has become

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recent evolution, if not a shift in meaning...».

<sup>12</sup>

Each year, the Council identifies priority research sectors which are then administered by the «Strategic Grants Division». Various themes are considered of «national interest» for granting purposes. For example, «Population Aging», «Women and Work» and «Canadian Studies» have been so identified in the past. Private enterprise was particularly favoured in three of the ten strategic sectors selected in 1984-85 and 1985-86: «Management of Organizations in Canada», «Development of Management Research» and part of the research devoted to «Science, Technology and Human Values».

the principal source of funding for a part of adult education research, due to the designation of «Education and Work in a Changing Society» as one of its priority research sectors. Table 1 shows the evolution from 1986 to 1992 in the number of projects funded in this area of research. During this period, a shift in «strategic priorities» can be observed. When the program was first implemented, «methods and content» were considered the priorities in the «Education and Work in a Changing Society» sector. Over time, however, vocational training has gained increasing importance.

**Table 1**  
**Number of research project grants, by category and year,**  
**sponsored by the «Education and Work in a Changing Society» sector**  
**of the SSHRC strategic grants program**

	86-87	87-88	88-89	89-90	90-91	91-92
Methods and Content	13	10	6	4	2	3
Clientele	6	2	7	2	2	6
Technological Change	6	1	0	2	0	0
Vocational training in schools	5	4	2	12	14	4
Management and executive training	3	2	4	1	0	1
<b>Total</b>	<b>33</b>	<b>19</b>	<b>19</b>	<b>21</b>	<b>18</b>	<b>14</b>

The very existence of this strategic research program has helped develop research on the links between training, labour and employment, a field of study of which adult training is a major component. However, 1994 is the last year for which «Education and Work in a Changing Society» will be considered a strategic theme in this SSHRC program.

### Trends in Research

In the preceding sections we discussed adult education research settings and main sources of funding. In this section we shall first mention some general trends in university research as a whole, and then examine its orientation from the perspective of specific topics.

#### General Research Trends in the University Milieu

We will begin by discussing some of the research trends that emerge from papers presented by Canadian professor-researchers (see Appendices 1 and 2).

#### *Research Methodology*

The setting where research is conducted strongly influences the choice of methodology. In more traditional universities — the Université de Montréal, for example — action research is hardly practised and descriptive research predominates, based on an array of quantitative and qualitative strategies (Blais, 1993). In newer universities, such as the Université du Québec à Hull, action research is favoured (Charbonneau, 1993). Community organizations, whose purpose is to bring about community development or social change, see research as a tool for change and thus use a participatory methodology. Work

conducted by the Canadian Congress for Learning Opportunities for Women (CCLOW), on literacy practices used with women (Lloyd *et al.*, 1994), is an example of this.

We must point out that the choice of methodology involves risks, particularly for university researchers, who must face two crucial tests: one when they submit articles for publication and another when they seek a promotion, requiring a peer evaluation. In the first case, some review boards will consider participatory research to be lacking in rigour, and reject articles reporting on it. In the second case, promotion committees may consider participatory research to be more of a community development practice than a relevant research strategy (Blunt, 1995). In both cases the outcome is the same: the research is not recognized. This explains why some universities do not encourage participatory or action research even if these methods are seen as good tools for social change.

It would appear that most adult education research conducted in the university setting is descriptive and interpretive. To a lesser extent it is historical or philosophical or both. The strategies most frequently used to collect data are surveys, questionnaires, interviews, case studies, analytical reviews and observation. Data analysis is at times quantitative, at times qualitative and at times both. Blunt (1995) and Rubenson (1995) have noted the emergence of a particular type of analysis based on the principles of critical theory. Some research using this approach has been done at the University of Saskatchewan (Blunt, 1995).

### ***Scientific Production***

In many universities students carry out a considerable amount of research (Blais, 1993; Blunt, 1995; Burnaby, 1995). In some cases, they are responsible for 50 % of the production within specialized adult education/andragogy units. As a rule, students choose their research topic on the basis of their interests and practical experience, since most of them are practitioners seeking to improve their professional skills. However, as Blunt (1995) points out, students' choices may also be subject to external influences — the research director, a member of the admissions committee (whose interest in an applicant's research topic may decide the fate of his/her candidacy) or the board of examiners who will deal with the research project once it is submitted.

Professors generally influence the direction of research topics, with the exception of sponsored research. Professors working in graduate programs, and particularly in research-oriented programs, find that it facilitates their own scientific production. Not only do their students stimulate the emergence of new research concerns, but their presence makes it easier to obtain grants, especially from the SSHRC (Canada) and the FCAR (Quebec). These grants permit the hiring of research assistants, often graduate students, allowing projects to progress more quickly.

Professors working in universities with only undergraduate programs are not only at a disadvantage in terms of grants, but have to deal with larger groups of students as well. A large part of their time is devoted to preparing and managing course work, marking papers and supervising students. In some universities there are not enough professors to meet the work load. In these circumstances, they must choose between doing research or keeping up programs and supervisory services for students (MacKeracher *et al.*, 1995). It is not surprising that research is not a priority in these settings.

### ***Access to Scientific Production***

Access to Canadian scientific production represents a problem. Over the years, great efforts have been made to catalogue research work done by students. Draper's were the first of these inventories (Draper, 1970, 1974, 1978, 1981). More recently, Dobson (cited by MacKeracher, 1989a) and MacKeracher (1989a and b) have prepared more comprehensive directories of Canadian publications on adult education. There is no one place in the country, however, where scientific production in this field is recorded. Since access to this knowledge is difficult, researchers tend to consult only the research itemized in the large data banks, such as ERIC (Educational Resources Information Centre).

The accessibility of Canadian scientific production is also linked to the problem posed by bilingualism in Canada. As a general rule, Francophone researchers publishing in French consult journals published in English in Canada, the United States and elsewhere. The same cannot be said for Anglophone Canadian researchers, who, for the most part, are unaware of what is published in French. Efforts to have

papers published in the two languages, particularly by the Canadian Association for the Study of Adult Education (CASAE/ACEEA), have thus far had little effect.

### **A Few Important Topics**

The breadth of the field of adult education/andragogy, the heterogeneity of researchers' approaches to the discipline, and the variety of their concerns are reflected in the great diversity of research topics which include: policy analysis; vocational training in the classroom and on the workplace; literacy; popular education; grass-roots participation; distance education; the media; historical, sociological and philosophical foundations; and so on.

Since the aim of the present exercise is not to report on research done in all these areas, we have chosen to look at five topics: vocational training in the classroom and on the workplace, literacy, educational involvement with adults, popular education and grass-roots participation, distance education and the media's educational mission.

### ***Occupational Training in the Classroom and on the Workplace***

In Canada at the present time, the economic situation and government political agendas have a decisive influence on the direction of research on vocational training of adults in the classroom and on the workplace. The rise of unemployment in the mid and late 1970s, computerization of the workplace and globalization of trade all contributed to defining research topics and objectives. The many task forces and commissions of inquiry set up by federal and provincial governments have also been a major factor in the research boom. Researchers have been sensitive to policy shifts relating to occupational training of adults and income security. Thus work has multiplied on public policies on vocational training, mechanisms to provide incentives and support for training, institutional classroom training of adults, the development of on-the-job training and the process of entry into the labour force.

In recent years, research issues have generally become more diversified. In the 1970s, the accessibility and social functions of vocational training dominated research. In the 1980s, access remained a major issue, but it was now also being approached from a feminist perspective, for example, or from the vantage point of social exclusion. Research developed, moreover, on the relations between training, work and employment, with a focus on links between public policy on training, private sector training policies, employment policy and different forms of organization of work.

Without being exhaustive, we will present a two-part review of research trends in this area. First, we will examine large surveys on adult participation in vocational training in the classroom and on the workplace, as well as research on access to training. Second, we will discuss research on relations between training and work.

### ***Large Studies***

In Canada there is no government agency responsible for regularly measuring adult participation in training, collecting data and centralizing it. Moreover, no government act or regulation compels employers or learning institutions to declare their training activities or the number of participating employees or students<sup>13</sup>. Such information is collected through large-scale surveys on participation in adult education, including classroom and on-the-job training. We looked at 13 of these large studies conducted over the past 15 years<sup>14</sup>:

- ! Survey on on-the-job training in Canada, conducted for the Adams Commission (Adams, 1979);

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<sup>13</sup> We should point out that compilations of student enrolment according to age in public learning institutions do exist (Statistics Canada, cat. 81-229).

<sup>14</sup> It is possible that other surveys on adult participation in education and on-the-job training were conducted on a provincial scale.

- ! Study on educational leave, conducted for the Adams Commission (Litvak & Maule, 1980);
- ! Survey on on-the-job training in Quebec, conducted for the Commission of Inquiry on Training for Adults (Paquet, Doray & Bouchard, 1982);
- ! Survey by the *Institut canadien d'éducation des adultes* and the Canadian Association for Adult Education (ICEA-CAAE, 1982);
- ! Survey on adult participation in training, conducted for the (Quebec) Commission of Inquiry on Training for Adults (CEFA, 1982);
- ! Study on educational leave by the Social Program Evaluation Group (1983);
- ! Statistics Canada survey on Canadians' participation in adult training in 1983 (Devereaux, 1984);
- ! Survey by the Ontario Manpower Commission (1986);
- ! Statistics Canada survey on adult training in Canada in 1985 (Devereaux, 1987);
- ! Statistics Canada survey on training and human resources development in 1987 (Rechnitzer, 1990);
- ! National survey on on-the-job training conducted by the Canadian Labour Market and Productivity Centre (1993);
- ! Statistics Canada study on adult education and training in 1990 (Couillard, 1993);
- ! Statistics Canada study on Canadians' participation in adult education in 1991 (Doray & Paris, 1994).

Six of the studies dealt with on-the-job training, with two of these examining a particular aspect of the subject: educational leave. Six targeted the adult population and reported on their participation in educational activities, including vocational training in the classroom or on the job.

The concept of training varies from one study to the next. This explains, to some extent, the differences in reported rates of participation and the difficulty of comparing the studies. With the exception of the two studies on educational leave, the general problem addressed by all of them is access to training. On the one hand, studies of individual participation in training attempted to establish a profile of the participants and pinpoint the obstacles to participation and the reasons for lack of participation. On the other hand, the aim of the studies of on-the-job training was to establish the characteristics of workplaces that invest in their employees' training and of those that do not. They also attempt to determine the type of educational activities that employers plan, organize or support, the characteristics of these activities and the number of employees participating.

In the 1970s, the issue of unequal access to educational resources was a pivotal subject in education research. Adult education was no exception, particularly since it was developed within a tradition of social change (Blunt, 1995; Welton, 1987). Studies portrayed adult education as an instrument of democratization but, at the same time, of social reproduction (Bélanger, Paquet & Valois, 1973; Paquet, Doray & Bouchard, 1982). The studies on adult participation in training, conducted by the ICEA and CAAE in 1984 and 1992, showed that factors such as initial schooling, age, sex and social position were determining influences in participation and contributed to reproducing social inequality (Doray, 1985; Doray & Paris, 1994). An analysis of the studies of on-the-job training shows, generally speaking, how private sector investment in employee training reproduces the main forces of the economy and the divisions between socio-occupational categories (Paquet, Doray & Bouchard, 1982; Doray, 1985).

In Ontario, a survey is conducted every two years on public attitudes toward education (Livingstone, Hart & Davie, 1992). One member of the research team, Davie, is particularly interested in adult participation in education.

Researchers have also studied individual constraints and obstacles to participation in adult education. Rubenson (1983) concluded that an individual's decision to take part or not in continuing education is, to a large extent, determined by their previous socialization, the hierarchical structure of work, the values of their membership and reference groups, and the way demand governs the supply of adult education courses. Chicha (1994) was interested in the same problem and analyzed factors leading women to seek on-the-job training, as well as those influencing their success. Feminist analysis applied to adult

education deals not only with women's access to education, but also their integration into the construction of knowledge. Lenskyj is interested in feminist educational methods as a factor influencing participation of the female labour force in education (Lenskyj, in press; Lenskyj & Burge, 1990).

Some researchers, finally, study the effects of new policies regarding income security and the development of employability on the situation of the employed. According to Deniger & Provost (1993), the very nature of the training that is offered makes it more of an instrument for managing social and occupational exclusion than a means of facilitating access and entry.

#### *Relations between Training and Work*

Research on relations between training and work differs from the above studies in that it examines not so much the mechanisms that determine access to vocational or on-the-job training but rather how training policies and activities are related to government employment policies and the organization of work. This type of research is concerned with three topics: training and qualification; training and private sector employment policy; and analysis of vocational training policies.

#### *Training and Qualification*

Two subjects are of interest to researchers: the identification of skills considered necessary to adapt to technology, and employers' training strategies. The introduction of new technology in the work environment has given rise to new research problems in the field of vocational and on-the-job training. Thanks to funding from a federal research program on the repercussions of technological change, there have been many studies on the subject, conducted jointly by universities and the trade union and business sectors. Studies on computerization of the workplace have emphasized the central role of employee training (Filion & Bernier, 1989; Bernier & Filion, 1992). The introduction of new technology, which calls into play not just «technical» qualifications but «social» ones as well, is not necessarily a de-skilling factor. Though a number of employers consider the training of white- and blue-collar workers to be insufficient, others have developed innovative training programs in connection with a major reorganization of work and redefinition of jobs (Bernier, 1992; Doray & Saint-Amand, 1993).

Adult education researchers are often asked to help identify training needs and develop educational programs. When such programs are being evaluated, they are also asked to examine the links between job requirements and training content. According to Therrien (1993), evaluation studies lead to more general issues, such as the link between training and employment, the effects of training on career paths, knowledge transmitted, etc.

#### *On-the-Job Training Policy*

Much research on on-the-job training has stressed employers' under-investment in this area, even if, according to Paquet (1988), the last few years have witnessed the birth of a parallel higher education system in businesses and government organizations.

On-the-job training research has also analyzed the training strategies of particular companies. Generally, these studies attempt to understand how training practices, employment policy and organization of work are tied together (Doray, 1989) or to identify the links between organizational change and adult training. Doray (1991) describes the development of on-the-job training in Quebec using a qualitative analysis of the uses of training. Bernier (1992) studied innovations in on-the-job training in the Quebec financial sector and found that they went in two directions: the first involving a reorganization of duties around a new commercial role in sales and customer service, and the second, the qualification of employees affected by job conversion in their workplace.

Researchers have also analyzed the transformation of workplaces from the point of view of workers experiencing new relationships to training and work. Serre & Wittorski (1992) examined the repercussions of the introduction of a training program in a textile mill, both for machine operators, individually and collectively, and for the organization of work. In another plant, where jobs and personnel were being reorganized, Doray & Saint-Amand (1993) analyzed workers' opinions of the innovation and the extent to which they co-operated or resisted change. Litvak & Maule (1980) studied educational leave policies in 13 public and private organizations in Canada, in terms of their approach to eligibility criteria



for training programs, costs involved, trade union positions, and factors influencing the development of policy.

#### *Policy on Vocational Training for Adults*

Over the last 12 years, important changes in policies on vocational training for adults have attracted the attention of several researchers. Morrison & Rubenson (1988); Thomas (1987, 1989); Blunt (1991a and b) and Dickinson (1991) criticize government approaches based solely on human capital objectives, which they see as breaking with the Canadian tradition in adult education. In an analysis of policy development since 1960, Paquet (1990 and 1993) points to a certain number of positive effects of recent changes, such as incentives for businesses to invest in training, closer links to the workplace and the diversification of training strategies. He also notes, however, that economic circumstances and market needs have heavily influenced the nature of activities and access to different programs. Current employability measures are also criticized because they do not really allow for the acquisition of skills.

Doray & Dubar (1988, 1990, 1991) decided to compare the transformation of the field of adult training in France and Quebec. They observed that the two governments had similar concerns about the development of occupational training for adults and shared common issues: increasing on-the-job training efforts; reducing inequalities in access to educational resources; and new links between training, work and employment.

The government of Quebec has ordered evaluations of the appropriateness of its policies. Two recent Quebec studies deal, for example, with customized training in the classroom (Dubé, 1991; Rousseau, 1992a, b, c). The federal government and other provincial governments have ordered similar studies.

#### *Literacy*

Practice in literacy has been far ahead of reflection. During the past decade, research has advanced considerably in quantity and quality, though overall it remains marginal and poorly established. A brief overview of the evolution of literacy research will help to present a few trends that seem to be emerging.

Research in this field has developed around two major historical factors : the consolidation in some universities of advanced studies programs in adult education/andragogy, and the increase in practical literacy work, particularly following the federal government's initiative in this field in 1987. In universities with graduate programs in adult education, a number of student essays and theses have been written on literacy. Furthermore, a few Canadian universities have specialized in the field and regularly publish articles and studies on the subject. Organizations working in literacy (community organizations and literacy agencies) have also developed their own research activities. The National Literacy Secretariat (NLS), created in 1987, has played a determining role, becoming the main sponsor and catalyst of research. In fact, the NLS almost holds a monopoly in this area, and has oriented its research toward federal priorities by favouring, on the one hand, statistical surveys and economic analyses, and on the other, some general studies and a proliferation of methodological or didactic studies, usually related to local literacy projects.

While literacy gained importance in the adult education field between 1987 and 1990, it has since stagnated or declined. This is confirmed by overall statistics : persons with a low level of literacy and education remain underrepresented in educational programs intended to benefit them (Couillard, 1993). Literacy thus remains a marginal sector of adult education, and one that has received little research attention. Literacy research is still fragmented and links between researchers are limited. The relative absence of a literacy research community is due to the split between two poles mentioned above (university and practice), as well as the division between two major literacy networks set up along linguistic lines. Moreover, with few exceptions, most research is not translated into the other official language.

Scientists, as well as many literacy workers, undervalue literacy research. For the former, it pertains to an imprecise field of social practice, whereas the latter often tend not to recognize its usefulness. Though literacy research has gained more legitimacy among adult education researchers, it remains disregarded (and consequently underfunded) by official research bodies.

#### *A Few Research Trends*

Although the low volume and atomization of research in this field render the identification of research trends uncertain, present practices make it possible to identify several directions. These are sometimes complementary and at others divergent or contradictory, for they are often influenced by different conceptions of literacy training and research.

Research is only starting to explore the complex reality of literacy training, but one of its main contributions has been to shatter the relatively limited conceptual framework of illiteracy and literacy teaching, in particular by exploring a third term : literacy itself. Drawing on a U.S. perspective, statistical studies of Canadian literacy levels (Southam, 1987; Statistics Canada, 1991) have targeted the skill levels of individuals in «processing information» they need in everyday life. This has revealed the existence of a continuum between illiteracy and literacy. Although supported by didactic studies centred on skills teaching, this functionalist tendency generally disregards the socio-cultural and socio-political dimensions of the phenomenon.

#### *Literacy in Relation to the Economy and the Workplace*

In the past, the literacy movement had a strong social and community outlook, in contrast to the rest of adult education, which is somewhat subordinated to the issue of labour force development. In recent years, several research papers (Taylor *et al.*, 1991) have redirected the sector toward a narrowly economic perspective. Current studies identify illiteracy as a major obstacle to a more competitive Canadian labour force (CEC, 1992, for example). Research can therefore be expected to intensify on the many facets of learning in the workplace, skills training and links between literacy and employability.

In 1994, Statistics Canada initiated a new study in co-operation with other industrialized countries. The examination of links between literacy and employment will again be very important. The question of literacy is addressed in a major longitudinal study on young people, who will be monitored until they reach adulthood. It is worth noting that the mass of data produced by past statistical studies has barely been analyzed.

#### *Child and Adult Literacy Training*

Until recently, when research started to bring them closer together (CTF/FCEE, 1991), the adult and child literacy sectors had remained mutually impermeable. Didactic theory has already begun to benefit from a large body of research on child literacy. Thus, the «integrated language» approach has begun to be applied to the teaching of adults (White & Norton, 1991). However, the andragogic particularities of adult literacy could be overwhelmed by the pedagogic perspective of this massive body of research. The danger is even greater in that school-based research focuses on the normal child who does learn to read and write, whereas adult literacy learners usually failed at school when they were children. As for remedial education research, it is marked by an individualistic and therapeutic approach that generally pays little attention to the social aspects of «learning disabilities». One can already find examples of conclusions being uncritically transferred. Research on youth illiteracy and literacy training (Tardif, 1992) may, however, offer a way to better reconcile the contributions of these two sectors, from a perspective that takes the issue outside the school setting.

#### *Action Research and Participatory Research*

Until now, research has been descriptive and qualitative, rather than basic and quantitative. Case studies are quite common (Draper *et al.*, 1992), as often occurs when a new field of research emerges. In Canada, qualitative research in both English and French has taken two original forms. One is action research, which offers an opportunity to bridge the gap between theory and practice, if not between theorists and researchers. The second methodology, promoted in particular by the Toronto-based International Council for Adult Education (ICAE), is participatory research, which stresses the contribution of all members of the community (Hall, 1979; Kassam & Mustafa, 1982). The two methodologies are complementary, with the former aiming to build a theory based on practice, and the latter involving all partners in the research process (Gaber-Katz & Watson, 1991). Learners are often original partners in this approach: their words, even their writings, are taken into consideration. For many organizations and researchers, these methodologies offer the best ways to take into account the social needs of illiterate

populations, and they remain one of the preferred forms of «militant» research. The work of the ICEA (Boucher, 1989); the RNAEF (Cardinal & Coderre, 1990; RNAEF, 1992) and the CCLOW (Lloyd *et al.*, 1994) are representative of this approach.

Given the relatively recent nature of concerns about literacy, it is understandable that most research is methodological or didactic, and why it focuses on the different stages of the literacy teaching process (from study of the local environment and recruitment up to the evaluation of learning) or on some of its features: motivation, learning disabilities, metacognition, etc. Several methodological research papers reveal an individualistic vision of the learner (Carpenter, 1986).

### *Linguistic and Cultural Aspects*

In a bilingual country comprising native, French and immigrant minorities with high illiteracy rates, researchers are faced not only with the linguistic dimension of literacy (in particular, the links between first and second language), but also with the ethno-cultural aspects of «minority illiteracy» (Klassen, 1991; Rodriguez & Sawyer, 1990; Wagner & Grenier, 1991).

### *Literacy in the Third World*

For a long time, Canadians have taken an interest in literacy and basic education in the Third World. Ties have been created across borders, particularly with other Commonwealth countries and with those of the *Francophonie*. Three organizations have contributed to developing this field of interest: the International Council for Adult Education (ICAE), the International Development Research Centre (IDRC) and the Canadian International Development Agency (CIDA). Several Canadian literacy studies (university papers, consultant reports) thus focus on literacy in the South.

### *Policy Analysis*

A final trend is conspicuous by its absence. Research papers recommending the implementation of policies do exist, but few examine literacy practices and policies at the «macro» level, particularly regarding their links to adult education or their subjection to neoliberal socio-educational policies. Nothing indicates that this will change in the future, since recent general policy studies conducted from a progressive perspective are the exception (Darville, 1992). Literacy research seems to have adapted itself to the objectives of its sponsors (greater integration into the economy, limited government responsibility, etc.) rather than to social demand. The community-based movement, which had previously played an important critical role, seems to have accepted government priorities. The absence of debate and, especially, of organized discussion concerning the direction of research and literacy training in general, suggests that this situation will continue. This is all the more surprising if one considers that overall budgets allocated to literacy are stagnating or declining and that several university adult education programs are experiencing difficulties. Government agencies, in an attempt to be more «efficient» and selective, seem to be reacting to budget restrictions by financing studies on the evaluation of literacy practices, models and organizations (MCL, 1991), as is the practice in the United States and Great Britain. The silence of researchers on literacy policies is particularly astonishing in the current economic climate, in which activities regarded as peripheral — such as research — are often the first to be affected.

In spite of everything, literacy research has grown and moved into new dimensions. Contrary to a minority tendency that is attempting to develop a global understanding of literacy, most researchers seem to contribute to a narrower economic and functional definition of this field of study.

### *Educational Intervention with Adults*

Research in this area is extremely varied. It covers the foundations of adult education; adults as learners; adult education; styles of learning; planning, management and implementation of programs; intervention strategies; and specific perspectives such as those of women, the elderly, aboriginal adults, and so on. We have chosen to target the following subjects: adult learners, styles of learning, and women's and aboriginal perspectives regarding adult education. Among intervention strategies, we have chosen prior learning assessment.

### *Adult Learners*

The list of people who are the subjects of research in adult education is impressive. They include young adult «drop-ins», women, workers, older adults, immigrants, «ordinary» adult students, minorities, adults with little schooling, professionals, adults as parents, adult educators and other personnel in learning institutions, the unemployed, prisoners, museum goers, and many others. This broad spectrum provides a sense of the different circumstances in which intervention occurs, and the many contexts in which adult education practitioners work and research questions are born.

Research on adult learners covers subjects as varied as their characteristics, motivation, attitude toward studies, and training needs. Many studies have been conducted on these topics in the past ten years. The second half of the 1980s, however, gave rise to a whole series of research projects focused specifically on the cognitive processes of adults. One example is the work of the Dufresne-Tassé team on intellectual and emotional functioning in spontaneous learning situations, in which a museum visit provided the opportunity for exploring spontaneous learning (Dufresne-Tassé, 1988; Dufresne-Tassé *et al.*, 1991). In addition to laying the foundations of «museum education» for adults, their work also shed light on processes previously ignored by cognitive psychology.

In a context in which adult educators are witnessing the return to their classes of more and more young adults who had dropped out, the exploration of cognitive processes in adults with learning difficulties is arousing much interest. Chamberland (1994) and a small team recently began work in this area.

### *Styles of Learning*

Some years ago, many researchers were interested in models for working with adults, learning styles, and teaching strategies and materials. Today attention appears to be focused more on the use of multimedia environments and electronic technologies: for example, the studies by Schwier & Misanchuk (1993) and Wong (1990), cited by Blunt (1995,) and those by Shale & Garrison (1989). In Quebec, Deschênes (1993) reports on a series of research projects on the subject.

Another very active line of research is that of self-directed learning. At the Université de Montréal, in particular, researchers Danis & Tremblay have collaborated closely in North American work on this question (Danis & Tremblay, 1988; Foucher & Tremblay, 1992; Tremblay, 1991).

### *Feminist Perspectives in Adult Education*

Many authors have pointed out that most students enrolled in adult education study programs are women (Blais, 1995; Blunt, 1995; Burnaby, 1995; Rubenson, 1995). At the Ontario Institute for Studies in Education (OISE), about 20 % of women students come from a health care background, primarily in nursing (Burnaby, 1995). Yet it is not they, but their female professors, who are doing feminist research. At OISE, in particular, research has dealt with feminist educational methods (Lenskyj, in press), feminist movements (Miles, 1995), feminist challenges for adult education (Burge & Lenskyj, 1990; Miles, 1989) and postmodern feminist theory (Norlan, 1992; Rockhill, 1992).

Elsewhere in Canada, we cannot fail to mention the 1987 National Conference on the Effects of Feminist Approaches on Research Methodology (Warren, 1987). Research has also been carried out by organizations dedicated to improving the situation of women, notably the work of Avebury (1986) on women's education, training and employment, and studies by Wismer (1988), done on behalf of the Canadian Congress for Learning Opportunities for Women (CCLOW).

### *Adult Education and Aboriginal Peoples*

It is only very recently, toward the end of the 1980s, that researchers (mainly at the University of Manitoba) became interested in the problems of aboriginal adult students. At least a dozen studies have been done on aboriginal training needs, intercultural problems, the exploration of social interactions as success factors and other topics. Strategies for success, such as participatory planning of orientation sessions and support networks in university programs (Kops, 1995), have also been researched. In Saskatchewan, Blunt (1995) has reported on studies conducted by the Saskatchewan Indian Federated College, concerning aboriginal knowledge, the social and cultural development of aboriginal communities and educational involvement with aboriginal adults.

### *Prior Learning and Skills Assessment*

Prior learning and skills assessment, defined as a «bridge» (Hamel, 1991) or «meeting place» between different systems (Kayembe, 1991), is unquestionably a preferred means of access to adult education. Since the 1970s, research in this area has been closely linked to the establishment of practices designed to meet the needs of adults planning to return to school or work, and seeking social recognition for the knowledge and abilities they have acquired through experience. The research can be classified along three lines: prior extracurricular learning assessment by the educational system; assessment of occupational skills acquired in a work setting; and self-recognition of prior learning and skills, starting from an initial self-assessment (Chaput, 1991).

With respect to the first of these — prior extracurricular learning assessment — a 1984 study covering a dozen Canadian universities revealed that prior learning assessment was the subject of very little research or practice anywhere in the educational system (Baker, 1984, cited by Thomas & Klaiman, 1992). Over the course of the 1980s, prior learning assessment practices appeared, in a very decentralized manner, in learning institutions, but they remain to this day subject to the receptiveness of individual institutions and faculties.

Following the work of the Commission of Inquiry on Training for Adults (CEFA, 1982) and the 1984 statement of guidelines and plan of action for adult education, Quebec is the only province to have decided to institute instruments for prior learning assessment, particularly at the college (CEGEP) level. Research was conducted for this purpose under the direction of the *Fonds pour l'implantation de la reconnaissance des acquis au collégial* (FIRAC). These studies were both practical and evaluative in scope: they sought to establish equivalency criteria and to learn more about clients asking for this service (Isabelle, 1984, 1985, 1986; Landry, 1986, 1987; Kayembe, 1990). More recently, a working group did a piece of action research on prior learning assessment at the CEGEP level for immigrants and members of ethnic groups (Horth, 1992). This led to a practical guide for CEGEPs. Research has also been conducted in Ontario on prior learning assessment (Thomas, 1987; Thomas & Klaiman, 1992). Thomas is interested, more specifically, in the different forms an employee's return to training may take, and in the use of prior learning assessment in place of a diploma in gaining access to postsecondary education (Thomas & Klaiman, 1992).

Until recently both the French- and English-speaking universities of Quebec were involved in the work of the *Centre d'information et de recherche en reconnaissance des acquis* (CIRRAC). The CIRRAC has been a fruitful centre of advocacy and research. Its work has included development of policy proposals on prior learning assessment, reporting on existing situations in Quebec universities, and establishment of a documentation centre on prior extracurricular learning assessment.

Prior extracurricular learning assessment is a subject that has long interested women's groups and community organizations. In 1985, the ICEA began a series of action research projects based on women's need for recognition by the educational system of extracurricular learning acquired through work in the home and volunteer activities (Blais & Thériault, 1985; Demers, 1988; Piché, 1988).

The second line of research — recognition of occupational skills — has focused on the implementation of systems of prior skills assessment and their subsequent evaluation. Other work has dealt with the skill-centred approach and methods of applying this model to the development of assessment tools. In Quebec, for example, following the report of the Interdepartmental Committee on the subject, the Vocational Training Commissions (VTC, which became the *Sociétés régionales de développement de la main-d'oeuvre*), together with educational institutions, helped to set up an innovative system of prior learning assessment, based on two frames of reference. The first stemmed from the school system and was based on educational programs; the second came from the workplace and was based on job profiles. Meanwhile, the Quebec ministries of Education and Higher Education and Science developed an assessment instrument to deal with the functional prerequisites for the admission of adults to vocational training at the secondary school level (MEQ-MESS, 1993). In 1991, the *Réseau international de formation et recherche en éducation permanente* held an international symposium on «Training/Work, Work/Training», to review these issues (Cloutier & Gladu, 1991; Hamel, 1991; Kayembe, 1991; Tardif, 1991).

The third line of research topic — self-recognition of prior learning, starting from the individual's initial self-assessment — has attracted few researchers. Following its studies on prior

extracurricular learning assessment from a women's perspective, the ICEA, in conjunction with *Relais-femmes*, in Montreal, and the Centre d'orientation et de formation pour femmes en recherche d'emploi (COFFRE), published a training and facilitators' guide entitled «*Question de compétences*» (1989). The aim was to facilitate recognition of the so-called «general» skills of women with little schooling who plan to return to work. The ICEA is now adapting «*Question de compétences*» to the living and working situations of illiterate persons.

### ***Popular Education and Grass-Roots Democracy***

The community environment and its organizations, together with union organizations, were the first bastions of adult education. Over time they have largely been supplanted by teaching institutions and labour force training organizations, but popular education has continued to develop through community action and collective projects. Popular education remains an essential tool in extending and implementing the citizen's right to education in a wide range of settings, and through many forms of training, from a perspective of social change.

Popular education in Canada does not necessarily have the characteristics of an exclusively educational movement. Rather, it takes the form of a central tool for the development of skills and collective advancement, implemented by social action organizations, trade unions and certain teaching institutions that are willing to respond to community needs in the area around them.

This characteristic is the source of both the strength of its educational traditions, rooted in the daily life of individuals and communities, and of its marginalization as a field of practice whose legitimacy is not truly recognized in the policies of the state nor by the formal educational system.

Despite considerable development in the field of popular education, stemming from a significant expansion of community-based movements in urban and rural environments and in a wide range of areas of action, state support for such initiatives is being withdrawn. While Quebec is one of the few provinces to benefit from government programs that specifically support popular education, funding for these programs has been gradually disappearing. The public institutions that supported popular education initiatives, as well as the trade unions that organized workers' education activities, have thus been deprived of funds. Contributions to community organizations have also been reduced. In addition, the federal government has sharply reduced resource allocations for trade union training, while limiting its support to the voluntary sector.

Such conditions clearly have repercussions on research in this sector. In the first place, researchers working in educational institutions rarely address the question of popular education<sup>15</sup>, because institutional priorities are geared more closely to formal education, schooling and preparation for employment. The educational practices of grass-roots organizations are more often studied in university research on social movements and social intervention. However, in this case as well, institutional priorities too often obscure the specific contributions made by community organizations in educating the population and in helping communities to take control of their own affairs.

Research studies on social promotion and participation, education for social change, community development, co-operative movements, volunteer activities and social activism are therefore the work of university researchers interested in the educational contribution of social movements. This research is mostly descriptive, however, since it centres specifically on forms of organization in the popular and trade union sectors.

Community services provided by some universities also constitute important resources for research and the application of research for popular or trade union organizations. Examples are the *Service aux collectivités* at the Université du Québec à Montréal, the Ontario Institute for Studies in Education (OISE) and the ACCESS Department at George Brown College in Toronto. Their contribution is centred on the analysis of popular education concepts and practices: action or participatory research, preliminary

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The *Dictionnaire actuel de l'éducation* (Rénald Legendre, Paris and Montreal, Larousse, 1993, 1 500 pp.), which contains an impressive collection of French terminology research, does not mention popular education in any of its 6 800 entries.

research for popular or worker education training programs, history of organizations and the development of their practices.

It is, however, the community organizations themselves that do the main researches on popular education, despite their limited resources. In particular, their work deals with policy analysis, as it relates to funding and recognition of popular education and the community-based movement, as well as with alternative policy development. These concerns arise from their precarious status and the need to demonstrate that they make a real contribution to the educational system and should have a legitimate place within it.

Community organizations carry out parallel studies on concepts and methods in popular education, though they do so too seldom, considering the need to systematize practices developed by popular and trade union trainers. This work, often in the form of action research, is in support of training activities: collection of data on client groups and their needs; preparation of programs for future trainers or for community or trade union leaders; improvement of adult education methods and development of training instruments; systematization and dissemination of training and popular action practices.

Though grass-roots groups do significant research at the local level, this is mainly the domain of national or provincial organizations; associations; coalitions; networking organizations such as the CAAE, ICEA, CCLOW or *Relais-femmes*; trade union centrals and large labour federations; and organizations specifically dedicated to training.

An inventory of this body of research, whose diversity is a reflection of the nature of the movements and their fields of endeavour, has yet to be done. Once compiled, it could only serve to stimulate exchanges among organizations and French- and English-speaking researchers who have little contact with one another. It would also serve to encourage partnerships between community movements which are a vehicle for social demands, and researchers who could shed light on and lend support to their practices.

At present, the fragility and insufficiency of grass-roots resources in research hinder the development of the study of popular education. Yet this field of study is promising, considering the growing demands made on the skills of citizens in a society undergoing deep and rapid change.

Popular education and grass-roots participation were initially and principally associated with action for social justice in popular and underprivileged sectors. Today they are destined to become the main agents of social, cultural, economic and political democratization: both will be essential if societies are to develop without generating social exclusion.

The development of a new civic culture; conditions for the consolidation of a vibrant civil society and social partnership that respects the contribution of social movements; the analysis of grass-roots contributions to the broad acquisition of civic skills and to the development of local and regional communities: all these themes represent emerging fields of study and of practice.

### **Distance Learning<sup>16</sup> and the Educational Mission of the Media**

Distance training is based on a long practice originating in teaching by correspondence, which has gradually been transformed by modern information technologies over the years. In recent decades, this type of teaching has seen considerable expansion. Several institutions make use of it, in particular the *Télé-université*, established in 1972 by the Université du Québec, and British Columbia's Open Learning Institute, founded in 1978. Canadian institutions devoted to its promotion and to the pooling of related programs and research arose during the 1980s, in particular the Canadian Distance Learning Association. These were associations linked to international networks, one grouping Commonwealth countries and another francophone countries (Sauvé, 1990). With the introduction of the information highway and advances in multimedia communications services, distance learning will doubtless see even more spectacular growth in the future.

As far as theory is concerned, while the practice of this type of teaching was largely inspired by psychopedagogical concepts advanced for face-to-face teaching, in the past twenty years it has prompted several university researchers to make it a specific field of study in order to respond to the questions it

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Prof. André-Jacques Deschênes has contributed to the writing of the section on distance education.

raises. Distance learning has thus become a field of study in which we find well-identified research sectors and a body of scientific knowledge to support its practice. Since the usual clientele is made up of adults, most studies focus on this learning group.

The progressive involvement of academics in the practice of distance learning, and questions raised on the subject by practitioners, have led to the application of tools that can better define it as a field of study. We have noted that in general, certain practices used in the classroom do not have the same effect when used in distance education; the clientele is not the same, the management of a system of distance teaching has its own characteristics. This type of training has thus become a field of study offering an increasing level of scientific expertise to support research and day-to-day practice.

Basic research began in the early 1990s, with the development of training programs on distance learning that facilitated the bringing together of professors specialized in the field. The *Télé-université* is a good illustration of the situation (Deschênes, 1993). This constituency of the Université du Québec is exclusively devoted to distance education. For many years, most of its resources went to the design of activities and courses, leaving little room for research. Research has only developed over the past five or six years. Since 1990, the *Télé-université* has been able to provide graduate-level teaching, thanks to which it has been able to form a group of professors whose principal work is to examine the field and its objectives. Previously, research activities in the field of distance learning and independent adult study depended on the personal initiative of the institution's professors and professional staff, without any structural support or coordination. In the past five years, the *Télé-université* has set up two structures to facilitate the development of basic research: the *Laboratoire en informatique cognitive en environnements de formation* (LICEF) and the *Groupe interinstitutionnel de recherche en formation à distance* (GIREFAD).

A recent inventory of studies on distance learning (Tobin, 1995) shows the impressive amount of work that has been carried out in the past few years. Continuing the work of Calvert (1986) on the subject, Tobin groups the issues examined by researchers into categories. The section in which she defines the student population involved emphasizes the issue of the autonomy of learners in the distance education process. Several researchers have taken an interest in specific groups of learners, women in particular.

Much of the research also deals with the development of programs adapted to this type of teaching. Contrary to what most of the practitioners involved seem to think, we find close similarities between distance education practices and those observed in the classroom. As well, studies on the learning of new technologies show little concern for basic principles for defining the programs that ought to guide this learning.

A third category of research groups together studies dealing with the pedagogical and institutional support available to distance learners. Despite a marked improvement in the understanding of support systems for learners and of their needs, the role of the facilitators in distance education institutions has not been sufficiently clarified.

Research on communication technology focuses on the satisfaction of learners and results obtained. It demonstrates that there are not necessarily superior technologies, and that what counts is the relationship between technologies and their users. The essential question is still to know the student better and to gain a deeper understanding of the organizational processes of learning.

In terms of economics, a certain number of studies have sought to determine the costs of distance education. These are for the most part case studies of specific institutions, rather than comparative research looking at the amounts committed to providing a service to users.

The need to relate distance education to the central mission of the university is a central theme in research on institutional structures and their staff.

Fields such as the marketing of distance education in general and the courses specifically offered by institutions have not received a great deal of research. The same applies to forms of collaboration between researchers, who have long insisted on the importance of cooperation between institutions and of the technologies that could facilitate such cooperation. In fact, this is why they are unable to benefit from their respective institutional experiences.

In many work environments, an increasing interest in distance learning has been noted. Here, the use of new technologies tends to fill the gap between classroom education and distance learning.



Overall, it seems that there is still not enough basic research on distance learning. Studies often seem to focus principally on the analysis of concrete experiences and practices. However, we can assume that the formation of teams of professors for advanced studies in the field will facilitate the accelerated development of this type of research in the course of this decade.

### *The Educational Role of the Media*

The multiplicity of settings, needs and kinds of training are among the most important characteristics of adult education. Another distinguishing feature, according to the specialists, is that it goes beyond the simple dimension of schooling. In this context we might expect non-formal education to be a relatively important area of adult education research, but in Canada this sector has the appearance of a poor relation. Whereas there is little to show in the area of popular education, as we have already seen, the situation is even bleaker for research into the overall educational mission of the media. Leaving aside value judgments on the quality of the content, the media are the main tools of empowerment available to adult learners, allowing them to follow the evolution of society and to have access to information that is essential in coping with a changing world and the many challenges of community life.

While the majority of private radio and television networks offer programming focused primarily on entertainment, Canadian public broadcasters have been entrusted with the obligation, through legislation, to take on an educational and cultural mission. In addition to the national radio and television public broadcasting corporation offered by the Canadian Broadcasting Corporation (CBC/SRC), many Canadian provinces have public television stations that are educational, in addition to channels completely devoted to television teaching.

Until now, the media's social and educational mission has attracted little attention from university researchers in adult education. The influence of television on the behaviour, lifestyles and values of youth and adults has of course been the subject of many studies, but very few take into account the issue of adult education and, particularly, of civic education and information.

There are few places in Canada where research is done systematically on the role of the media in adult education, in the broad sense. Among the principal ones are the educational television networks, such as *Radio-Québec* and TV Ontario, the *Institut canadien d'éducation des adultes* and the Canadian Association for Adult Education (CAAE). The CAAE has always been very interested in the role of the media and has been the source of many studies on the subject.

Research done by educational television networks has generally been of a utilitarian nature. The studies, in most cases, are designed to prepare program content or analyze audience reaction and behaviour (RQIC, 1988). The research team at TV Ontario has managed to go somewhat beyond this framework to try to deepen the analysis of educational approaches best suited to adult audiences. We should point out that in Quebec, *Radio-Québec* has included in its mandate the research conclusions of the Quebec Ministry of Education on teaching methods.

The ICEA and CAAE are among the few organizations that have examined the overall educational function of the media. Their studies have dealt, for example, with the development of the policy and regulatory framework relating to the media. The media's contribution to civic education and information directed at adults is another of the ICEA's research priorities. In collaboration with the universities, it also conducts a project, updated every two years, on the evolution of programming carried by Quebec television networks (ICEA, 1994b). Thanks to a grant from the Canadian Studies Program of the federal government, the Institute also carried out an important study on the place and role of the media in Canadian society (Trudel, 1992).

Among the main topics addressed in research that is not exclusively focused on adult education are the media's influence on violent behaviour and family life, and media literacy. The latter subject is of growing interest to researchers working in educational networks. Their research on this topic, however, concerns almost exclusively the creation of media literacy programming for youth (Piette, 1994). Ontario is farthest ahead in these programs, under the leadership of the Association for Media Literacy (AML), which has also fostered the introduction of a course on the media in language teaching.

The low level of interest in the media shown by those involved in adult education lends some credence to the many who criticize the education sector for its lack of openness to new realities. Continuing education will increasingly follow the path of the electronic superhighway, and the great risk is that we will witness a growing integration of the sector into the sphere of the market. Research on the media's contribution to education is a field that urgently needs to be opened.

### **Conclusion**

We have drawn a picture, in broad strokes, of the situation of adult education research in Canada. We first described the context in which such research is evolving and then portrayed the many research settings, the types of work being done, the ways it is disseminated and, briefly, how it is funded. Finally, we discussed some general trends, mostly in university research, and some important research topics.

We have left out many subjects that certainly should be explored. We are thinking particularly of problems connected with the elderly and public policy research/ analysis, to name only two.

We believe, however, that a true picture of the current trends in adult education research would need more complete information, so that we could identify areas of convergence, as well as divergence, of interest. We would also have to conduct a closer examination of certain affinities among researchers, research and practical settings, and research topics. For example, it would be useful to try to determine which topics are of concern in a given research setting and why, and which topics lead to fruitful partnerships and who are the actors involved. In short, if we were able to combine more complete information with more systematic analytical tools, we could no doubt produce a more precise overview of research trends in adult education in Canada.

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## Appendix 1

**61<sup>st</sup> Meeting of ACFAS**  
**Association canadienne française pour l'avancement des sciences**  
***Research Trends in Andragogy/Adult Education and Social Demand***  
**Rimouski, May 17-21, 1993**

***Guest professors:***

Lucien Aubé, Université du Québec à Montréal  
Madeleine Blais, Université de Montréal  
Benoît Charbonneau, Université du Québec à Hull  
André-Jacques Deschênes, Télé-université (UQAM)  
Julio Fernandez, Université de Sherbrooke  
Thérèse Morin, Université du Québec à Rimouski  
Jean-Réal Nadeau, Université Laval, Quebec City  
Rita Therrien, Université de Montréal

***Papers kept at the Centre de documentation sur l'éducation des adultes et la condition féminine (CDEACF) in Montreal:***

AUBÉ, Lucien. *Recherche en éducation des adultes à l'Université du Québec à Montréal (UQAM).*

BLAIS, Madeleine. *La recherche en andragogie/éducation des adultes à l'Université de Montréal: Tendances.*

CHARBONNEAU, Benoît. *Tendances de la recherche en éducation des adultes dans l'Outaouais québécois et la demande sociale actuelle.*

DESCHENES, André-Jacques. *La recherche en éducation à la Télé-université.*

FERNANDEZ, Julio. *Les tendances de la recherche en éducation des adultes à la Faculté d'éducation de l'Université de Sherbrooke.*

MORIN, Thérèse. *Tendances de la recherche en éducation des adultes dans le Bas du Fleuve et dans la Gaspésie.*

NADEAU, Jean-Réal. *La recherche en éducation des adultes et en andragogie à la Faculté des sciences de l'éducation de l'Université Laval.*

THERRIEN, Rita. *La recherche institutionnelle en éducation des adultes et son environnement.*



## Appendix 2

### CASAE Symposium

#### *Research Trends in Adult Education and Social Demand*

**Ottawa, June 12 and 13, 1993**

#### *Guest professors:*

Adrian Blunt, University of Saskatchewan  
Paula Brook, University of Alberta  
Barbara Burnaby, Ontario Institute for Studies in Education (OISE)  
Don Chapman, University of New Brunswick  
Marie Gillen, Saint Francis Xavier University, Nova Scotia  
Riva Heft, Concordia University  
William J. Kops, University of Manitoba  
Dorothy MacKeracher, University of New Brunswick  
Kjell Rubenson, University of British Columbia

Papers published in the *Canadian Journal for the Studies of Adult Education*, Special issue. *Adult Education Research in Canada*, 9(1), 1995.

BLAIS, M. *La recherche en andragogie au Québec. Quelques tendances dans le milieu francophone*, 17-30.

BLUNT, A. *Adult Education Research in Saskatchewan*, 63-88.

BURNABY, B. *It Depends on How You Look at It: Trends in Research in Adult Education in the Department of Adult Education at OISE*, 31-52.

KOPS, W.J. *Trends in Adult Education Research in Canada: A Manitoba Perspective*, 53-62.

MacKERACHER, D., CHAPMAN, D., GILLEN, M. *Trends in Adult Education Research in Atlantic Canada (or We're Dancing as Fast as We Can)*, 1-16.

RUBENSON, K. *Trends in Adult Education Research in British Columbia*, 89-94.

**Appendix 3****CANADIAN ORGANIZATIONS CONSULTED**

- ! Canadian Association for Distance Education
- ! Canadian School Boards Association
- ! Canadian Association for the Study of Adult Education
- ! Association of Universities and Colleges of Canada
- ! Centrale de l'enseignement du Québec
- ! Canadian Labour Congress
- ! Canadian Congress for Learning Opportunities for Women
- ! International Development Research Centre
- ! Fédération des communautés francophones et acadienne du Canada
- ! Forum pour l'emploi
- ! Statistics Canada
- ! National Literacy Secretariat

## Trends in Adult Education Research in Latin America

Isabel Infante  
OREALC  
Santjago de Chile

### 1. A survey of educational research in Latin America.

A way of highlighting the approaches and the development of research in Latin America is to focus on the origin of the precise topics that are object of research.

An analysis of their sources, makes it evident that such topics are not the product of clear and homogeneous processes originating from theories developed from reflection and rather academic discussions; instead they are in some way derived from the problems that - starting from the different cultural and social-political processes, with the specific characteristics of each country - have been accepted as relevant for the research and for the researchers.<sup>1</sup>

Many factors influence this process. Among them, it would be appropriate to mention not only those related to the practice and the specialty of the researchers themselves, but also those dealing with the public policies of the governments, the concern of private associations, of the churches and of the financing agencies and the influence of the research processes in center countries.

Educational research has followed the development of education on our continent, and it has been implemented within the framework of the larger debate about underdevelopment. To the degree that the interpretation of the latter has changed, what is demanded of education has changed, and there have emerged different interpretive frameworks to think about it and to research it.<sup>2</sup>

Hence different trends have left a deep imprint in its evolution. In the '60s, development-oriented thinking influenced the concept of education as a fundamental tool to build a modernized and technocratic society. Thus, education was seen as a profitable investment whose dividends would be human resources able to produce economic development and a responsible citizen in a stable democracy. Furthermore, education would narrow social differences, overcoming underprivileged and promoting social mobility.

In research terms, the central preoccupation was educational planning, conceived as powerful instrument to achieve a more efficient educational system, that permits access to all. This research includes diagnoses related to the expansion and efficiency of the educational system. The researched topics are: access to school and permanency in school of different populations and social groups; availability and training of the educators; human resources planning; financing of education.

Toward the end of the '60s and the beginning of the '70s, the optimism that characterized the development-oriented era vanished and an especially turbulent era started. The theory of dependency dominated, holding that the roots of a society's problems are found in the economic structure of the society itself, and this in turn relates to the development of world capitalism, which conditions it. The interpretations of education also change: It is visualized, at least on the part of one group of educators, as "an instrument for the social and ideological reproduction of the prevailing system."<sup>3</sup> A crisis in education was the talk of the times.

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<sup>1</sup> Brunner, J.J.: *Algunas Consideraciones sobre la Investigación Educativa en América Latina*. Santiago: FLACSO, Documento de Trabajo Nr.202, 1984. p.25.

<sup>2</sup> García-Huidobro: *Investigación Educativa en América Latina: Algunas Reflexiones sobre su Desarrollo y Marcos Conceptuales*. Santiago: CIDE, Documento de Discusión Nr.23, 1988. The following paragraphs are a partial summary of his statements.

<sup>3</sup> Rama, Germán (coord.): *Desarrollo y Educación en América Latina y el Caribe*. Bs.As.: CEPAL/UNESCO/PNUD, 1987. Quoted in García-Huidobro, J.E., op.cit., p.8.

In that era, educational research fundamentally provided accusation projects that attached blame. There was a gain in depth and breadth by focusing on education from a structural vision of the social problems, going beyond the limits of the school, but the critical capacity, strongly influenced by ideologies, was not accompanied by proposals for change.

Currently, at the level of Latin American social and political thinking, it is not possible to find today "the" theory that could represent and frame the present. There is much research in several arenas. Reflection about the relationship between education and society is not in the foreground anymore.

Other topics emerge that mark the approaches and will constitute the objects of research, as, for example, the question of the quality of education at all levels. The topic of the school appears more hedged: it is not the tool to carry the society to development or to pull underprivileged sectors from poverty; nor is it just a relentless machine to reproduce the prevailing social injustice. In fact, it has served the poor throughout the years: the challenge is to discover how it can serve them better.

With this purpose, it is necessary to enter into the processes that are developed within the school, inside the classroom, inside the school culture. The relevant question that challenges research is how to make certain that staying in school assures access to knowledge and to the cultural codes necessary to live and act in society.

It is also necessary to accept the innovations that come from practices different from those included within the school system: the experiences that have been carried out in less privileged sectors in the framework of popular education and to review how much of it can be used to improve the school.

## **2. About research in adult education.**

Adult Education research also follows the educational development of this mode. Because of this, the configuration of the problems on which it focuses is related to the trends that education has followed throughout the years.

As a basic consideration, it is necessary to indicate that, in the first place, adult education in Latin America has been primarily education of poor youths and poor adults<sup>4</sup>. In spite of the advances in the economic recovery of the last years<sup>5</sup>, huge disparities of income remain in Latin America. Poverty is a formidable challenge, and it is taken as such, even assumed as their own, by some governments.

As a rule, this situation has, in some way, made more evident the political project underlying the concept of adult education and the relationship that it has established between education and the project of society.

Historically, from this perspective, different trends can be visualized in this educational modality. They are related to the concept of social change and to the function for underprivileged sectors,<sup>6</sup> that was attributed to education, especially in the years in which these topics were relevant criteria for analysis.

Thus, there were discussions about an "integrative" trend of the "marginal" sectors, which would have been implemented through educational programs and fundamentally through the creation of basic schools for adults at the beginning of the 20th century.

On the other hand, *ad hoc* training programs were qualified as "functional," according to the requirements of a given project. This sort of program, which had appeared on a reduced scale at the end of the 19th century, acquired greater proportions in the era in which development-oriented thinking was mastering the direction of education.

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<sup>4</sup> See regarding this approach, the review of the multiple experiments in Adult Education in Latin America in, for example, Rivero, J.: *Educación de Adultos en América Latina. Desafíos de la equidad y la modernización*. Madrid: 1993.

<sup>5</sup> The gross internal product in the region grew in 1991 by 3.7%; in 1992, by 2.9% and in 1993, by 3.3% (Banco Interamericano de Desarrollo: *Informe anual*. Washington: 1994.)

<sup>6</sup> A longer explanation of the trends can be seen in: Infante, Isabel: *Educación, Comunicación y Lenguaje. Fundamentos para la alfabetización de adultos en América Latina*. México, D.F.: CEE, 1983.

Finally, in the '70s and until the mid '80s, the educational actions derived from the education "for liberation" had much importance, linked with educational projects of the Catholic Church that follow the thoughts of P. Freire. As a result, "Popular Education," which although in theory deepened its political dimension, in practice translated into an assortment of educational actions that were seeking a certain leadership from the poor; or at least, that the poor express themselves as persons and improve their quality of life.

All these trends should be considered in relation to different political contexts that influence strongly their various manifestations. The latter became stronger in the context of the military dictatorships in the Latin American countries, which impelled many educators to leave the formal school sector, even to abandon research in these areas, and devote themselves more fully to the informal education of the poor.

Linked with these trends, research in Adult Education has developed different strategies. From the quantitative -which showed the educational coverage- to research on the cultural processes developed in popular education, which certainly was the strongest trend in Latin America until the mid 1980s.

Little by little, the Popular Education processes are visualized as action-research, as proposals for change based on action and reflection, in which the perspective of the participants is confronted with the proposal of the educators. Based on the contributions of P. Freire, there is an attempt to change the situation through a process of critical awareness of the reality.

Although the systematizing of the experiences does not conform with the number of those completed, the processes and reflection generated by Popular Education strongly enrich the educational area, adding new points of view within the research. The anthropologists' influence is also felt, as that of M. Mead, and the contributions of the sociology of knowledge, which help to penetrate the cultural dimensions of learning, in the strategies and learning styles of the different groups. Equally, the processes of popular education are opened to new consideration, such as that provided by the theory of communications, especially based on the philosophy of language and its exponent F. Flores.

In the methodological field, from the beginning of the action-research, the topic of participation of the subjects in the research is stressed; this is referred to as "participative research" or "participating," where knowledge is produced not solely from the persons constituted as "objects of research," but through the dialogue with the participants in the educational processes as linguistic subjects.

Concerning evaluation, some models emerge that attempt to propose alternative forms, considering the complexity of cultural action.<sup>7</sup>

One of them is the illuminative approach, developed by Malcolm Parlett and Gary Dearden, that seeks "to illuminate" the educational processes through a series of questions, studying how the program that is evaluated operates, how it is affected by the different situations in which it is inserted and what its participants consider its advantages and disadvantages.<sup>8</sup>

The illuminative evaluation consists in "the interpretation, in each study, of a variety of educational practices, of the experience of the participants, of the procedures that characterize the institution and the problems of the administration. The interpretation must be such that it is understood by those for whom the study is made, and in case the study is about themselves, that they recognized themselves. It must be useful.(...) This evaluation is characterized by a flexible methodology that uses the available resources and opportunities in a specific case."<sup>9</sup>

Meeting the expectations of the various participants, the illuminative evaluation provides a wider set of observations and interpretations, with which it becomes closer to the complexity of a process of a

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<sup>7</sup> See, for example: Richards, Howard: *La Evaluación de la Acción Cultural Estudio evaluativo del Programa Padres e Hijos (PPH)*. Santiago: CIDE, 1985.

<sup>8</sup> See Walker, H.: *Una evaluación para los proyectos de Educación Popular*. Santiago: CIDE, Doc. de trabajo, 1982.

<sup>9</sup> Parlett, M. and G. Dearden, quoted in Richards, H.: *Apuntes del Seminario sobre Evaluación de la Acción Cultural*. Santiago: CIDE, 1980, mimeo

cultural type. On the other hand, the flexible methodology permits a greater adaptability between the technique and actual practice.

The second approach, called hermeneutical-dialectical, attempts "to understand" the sense of the process within a determinate social context. In it, two aspects that seem of great relevance can be underlined, especially for processes of Popular Education:

- the consideration of the persons "researched" as linguistics subject and, as such, able to enter into a dialogue with the researchers. The researched cease to be the "object," and become, together with the researchers, *dialoguing* "subjects" about the cultural process;
- the recognition of the conflictive character of the reality and of the cultural aspects of the conflicts.

In this approach, it is especially interesting what the educational process means for the subjects involved in it, in their actions, achievements and difficulties. The meanings are expressed in symbols and in linguistic forms that take into account the cultural representation that the reality that is evaluated has for the subjects. This interpretation, the "hermeneutic," coincides with the traditional approach toward the human sciences that is widely developed in some countries.<sup>10</sup>

In the cultural context, the conflict takes on a permanent form, because in this reality the antagonistic significance of society are expressed, which reflects the conflicts of the social groups. Hence the name "dialectical." A literacy program that attempts to help the oppressed groups conquer their "word", is necessarily located in a conflicting field and develops its practice based constantly on it. Because of this, the consideration of conflict in the interpretation of the socio-cultural context seems of extreme importance to achieve a most exact comprehension of the reality. Otherwise, we would lack some basic criteria to understand the testimonies of the participants.<sup>11</sup>

Currently, research in adult education is seen to face challenges similar to those of research in general, and its focus is on discovering the factors that affect the quality of adult learning. However, the deficiencies of the research in this field are remarkable, especially regarding formal education.

The educational priorities of the region have been expressed in the consensus around the Principal Education Project promoted from 1980 by UNESCO in the region, whose main objectives are: to assure before 1999 the education of school-age children and to offer them a minimal general education of 8 to ten years; to overcome illiteracy before the century's end; to develop and widen the educational services for the adults; and, finally, to improve the quality and the efficiency of the educational systems through the necessary reforms. Numerous educational research projects have been geared to these objectives.<sup>12</sup>

The Principal Project has developed its actions through four networks, which were established starting in 1985. The Regional Training Network and Specific Support to Literacy and Adult Education Programs (REDALF) has served as framework and impulse for important regional education initiatives and research in the field under this modality.

Having begun in a very reduced form, compared to other sectors and topics,<sup>13</sup> adult education research has shown a strong growth in the last years, even though its progress is not constant over time. In an analysis of a sample of 1,000 analytical summaries in education<sup>14</sup>, which gather documents that can be

<sup>10</sup> For example, W. Dilthey, P. Ricoeur, H.G. Gadamer.

<sup>11</sup> For more information about this point, see Infante, M. Isabel, op.cit., 1983., pp. 77 ff.

<sup>12</sup> UNESCO/OREALC: *La investigación en educación en América Latina y El Caribe en relación con los objetivos y prioridades del Proyecto Principal de Educación*. Santiago: 1986.

<sup>13</sup> García-Huidobro, J.E. and J. Ochoa: *Tendencias de la Investigación en Educación en América Latina*. Santiago: CIDE, Documento de Trabajo Nr.1, 1978, p.64ff.

<sup>14</sup> The Analytical Summaries of Education come from the Documentation Network in Education for Latin America (REDUC), a cooperative information service in education, integrated by Education Investigation Centers in Latin America and the Caribbean. Its objective is to collect and to spread educational information, especially with reference to investigation and to innovative educational

defined as "research," the authors verify that from 1978 until 1988 the topic of adult education has grown from 9.7% to 15.5%<sup>15</sup>.

Previous research had shown that the countries in which the topic had been developed the most were those with a higher educational development level, that is to say, Argentina, Venezuela, Uruguay and Chile. In the years included in this last study, the countries that proportionally (27.7%) present more projects in this field are the lesser developed countries, such as Guatemala, Nicaragua, El Salvador, Bolivia, Honduras and Haiti. Countries with relatively more development devote to adult education projects only 11.1% of their research papers.

That same study shows that the research projects originate fundamentally in private centers (43.4%) and in international agencies (29.4%). The contribution of governments is smaller (19%) and that of universities (8%) is even less.

In spite of the growth pointed out, it can be observed that adult education has not been a high-priority topic for research especially in universities just as it has not been in educational policies. The congruity in this point reveals in some way how the educational topics are configured in objects of research.

Some authors suggest that there exists no clear theoretical body that could pull together the experimentation in this field and build a common language among the educators.<sup>16</sup>

### **Some thematic trends.**

When research projects are grouped according to their thematic trends, the problems that have always accompanied adult education and have been the object of research are highlighted. What is interesting is that also in them can be seen the evolution of the thematic and of the approaches from which they have been studied. Also, some new topics can be found, as a product of development of the reflection linked to educational practice, of the influence of new agents and of educational policies.

### **Literacy**

One of the problem areas of many studies is illiteracy and, therefore, literacy. In spite of the fact that absolute illiteracy has been reduced to 15% of the population older than 15 years (42.5 million), it still persists as a concern, especially in the countries with greater indigenous and rural populations.

The approach to the topic of literacy, in addition to having been treated differently according to the trends in adult education already pointed out, has changed according to the advances in the understanding, within the region, of the fact that illiteracy in its different forms is linked, among other factors, with the quality of the learning that children have achieved during their school years.

This realization entails three considerations: illiteracy is not a phenomenon linked only to the adult world; the learning process of reading, writing and mathematics is a very complex process that reveals the inappropriateness of school teaching to the socio-cultural characteristics of the children and, therefore, to their ways of learning; the approach favors the unveiling of learning over the teaching methodology.

From here derives a series of concerns that currently have been transformed into objects of research related to the learning in children and, later, with learning in the adults, which is still found in an initial stage of development.

In addition, the certainty of the fact that a precarious or beginners' control of the written codes is not enough for a person to function adequately in modernizing societies, generalized in the countries of the region, has given a high priority to considering the "functionality" of literacy.

experiments, formal and informal. In its years of operation, more than 12,000 projects in education have been summarized. At present, it has with a computerized base of 9,385 summaries, from 1983 until 1993.

<sup>15</sup> García-Huidobro, Juan Eduardo y otros: *Tendencias de la Investigación sobre Educación en América Latina*. Santiago: REDUC/CIDE, 1989, p.23f.

<sup>16</sup> Gajardo, Marcela: *Educación de Adultos en América Latina. Problemas y Tendencias*. Santiago, UNESCO/OREALC, 1983, p.61.

Taken from different angles, the concepts of literacy clearly reveal the trends indicated concerning adult education.

There is multiple research and two totally different approaches appear. The first, quantitative in style, is linked to the national literacy campaigns; most of the time it does not exhibit great precision and attempts to show the achievements of a given government in the reduction of the illiteracy rate. The second one is inherent to literacy itself in the line based on Freire's perspective and it has taken place within the educational process itself and is centered on the reality of the participants; it must, starting from it and from its codified reality, return that reality to the participants for their reflection and decodification.

In the last years, both forms have had numerous concrete expressions. Evaluation has been an important topic among the studies of adult education. However, rarely it is carried out at the end of a campaign; for this reason, it has historically been very difficult to verify the real impact of a campaign precisely in terms of the achievements reached in reading and writing.

In this line, it is worth to mention the effort shown in Ecuador, in the evaluation of the National Literacy Campaign Monseñor Leonidas Proaño, developed in 1990 in a democratic context, which reached about 200,000 persons.

To provide a more complete vision of the results, both an internal and an external evaluation were promoted. The first, developed during and at the end of the campaign, focused the observation on the point of view of the literacy workers. The second, supported by UNDP and UNESCO, began at the end of the campaign and included the perspective of those who had been taught to read and a measurement of the reading and writing levels they reached.<sup>17</sup> In addition, both evaluations included qualitative elements that complemented the quantitative data.<sup>18</sup>

The second form, the research of the universe of the participants, has been developed within popular education in multiple experiences that fit under the action-research denomination and participative research, these have focused on the reality of the participants in different areas, such as health, housing, work, etc. They are normally inserted in the informal education related with such areas.

The approach to learning in adults, in some way linked also to the interest of the participants in relation with popular education, has been derived from the study of the cultural aspects that impact learning and, influenced by contributions from psychology, in the analysis of the cognitive strategies that they develop for the decodification of the written language and to accomplish the basic mathematics operations necessary in daily life.<sup>19</sup> From here emerge interesting studies in ethno-mathematics that may serve to elaborate study and program texts addressed to adults. In Latin America, the research into adults learning to read and write is still in an embryonic phase.

In addition, it would have to be pointed out that the number of the many written experiences does not conform with the number of them carried out, since in reality those that systematize their actions are few. Although in fact certain research is done, the demands of action impel educators to give less importance to the deepening of their experiences. Some that do make it frequently introduce anthropological elements that enrich their analysis.

### **The skills developed by adults, or functional illiteracy**

Many Latin American countries, having reduced their rate of absolute illiteracy because of the increase in children's schooling, focus their attention on what has come to be known as functional illiteracy, that is to say, on the disability of many adult persons to function adequately in an environment that demands

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<sup>17</sup> UNDP-UNESCO: *Evaluación externa de la Campaña Nacional de Alfabetización "Monseñor Leonidas Proaño"*. Quito: 1990.

<sup>18</sup> UNICEF: *Informe de Evaluación Final*. Ecuador: 1990.

<sup>19</sup> Carraher, Terezinha Nunes: *Sociedade e Inteligencia*. Sao Paulo: 1989.  
CEAAL/CLEBA/Educational Dimension: *La enseñanza de la matemática con los adultos de los sectores populares*. Bogota: 1990.  
Grove, Isabel: *Mathematiques dans la vie quotidienne chez des paysans chiliens*. Thesis doct. Universidad Católica of Lovaina-La-Nueva, 1992.



a mastery of certain skills related to the written code, that presumably are developed through some years of schooling.

With the support of OREALC and the Iberoamerican Office for Education, a regional research of pilot scope was completed in 1992. Its objective was to determine, through a survey in a sample of adult persons with incomplete basic schooling, the principal features that functional illiteracy presents in four countries of our continent.<sup>20</sup>

In this first stage, the research was carried out in Chile, Argentina, El Salvador and Peru. The preliminary results, divulged by the different countries and discussed in a Technical Meeting held in El Salvador in November of 1992, showed the importance of continuing and widening this research line. To support decision-making concerning the carrying out of educational actions along the line proposed by the research, the Directors of the Adult Departments of the Education Ministries of the different countries involved were also invited to the meeting.

The topic has attracted interest in most of the Latin American countries. Colombia, Mexico, Venezuela, Brazil, Panama, Paraguay, Honduras and Guatemala have included the topic of the research among their priorities for the next years, as they expressed it in the Planning Meeting of the REDALF held in Caracas in 1993, since they perceive that this is a problem that all will have to approach with effective strategies in the short term.

In its pilot phase, the research focused fundamentally on the aspects of reading and writing, basic mathematics, occupational and social skills, investigating the yields in these areas and relating them with some characteristic of the adults, such as schooling, sex, occupational insertion level and participation in social organizations.

The research concentrated on a sample of adults with incomplete basic schooling in zones affected by modernization processes.

In spite of the insufficiency of funds that prevented the deepening of its qualitative aspect, the research arrived at conclusions important to the design of school and non-school policies, showing remarkable coincidences among the countries.

It demonstrated that the inflection point for an effective retention of school knowledge is found in the fifth grade of primary education; that the difficulty of the different skills of reading and writing and mathematics is similar in several of the countries studies; that a certain similar graduation of the same can be discovered, speaking in favor of the utilization of similar basic didactic materials. It showed also that many occupational and social skills (self-esteem, autonomy, communicative capacity, etc.) are directly related to achievements in reading and writing and mathematics. (For example, there is a smaller verbal communicative capacity among the illiterate, especially with respect to the capacity of "convincing" others.)

### **The Quality of Basic Adult Education**

Another aspect that has arisen as a concern in the development of adult education is related to the quality of the existing basic education. Very few countries possess an accurate diagnosis concerning coverage and the characteristics of this modality, starting from which they could design improvement projects. In addition to this, there is an awareness of the fact that adult education lives today "a moment of deep reestablishment, a product of the drastic changes taking place in the region"<sup>21</sup>. This is a stage in which adult education must be structured differently so that it can answer appropriately the demands of youngsters and adults, considering the work and the political and social participation requirements.

The World Conference on Education for All, which centered its approach on "basic learning needs," states the requirement of revising the quality of the Basic Adult Education (BAE), of the learning and skills achieved in fact by it and the need for widening the concept of the beneficiaries of basic education: not only

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<sup>20</sup> Infante, M. Isabel: *Acerca de la investigación sobre analfabetismo funcional en Chile, Argentina, Perú y El Salvador*. Paper presented to V Reunión Técnica de la REDALF, Caracas, August 1993. In: *Contraste* Nr.20, July-December 1993. Cali, Colombia: 1993.

<sup>21</sup> García-Huidobro, J.E.: Los cambios en las concepciones actuales en la Educación de Adultos. In: UNESCO/ UNICEF: *La Educación de Adultos ante el próximo siglo*. Santiago: 1994.

children, but also youths and adults; of the contents, including all those that are necessary to face the basic problems and, finally, to widen the financial and human resources committed to the task of education for all. This compels the institutions that now face this task separately to work jointly.

The proposal of UNESCO/ECLA on "Education and knowledge, axis of the productive transformation with equity" permits a reevaluation of the role of BAE in the current development of Latin America and to integrate it in the effort to increase simultaneously, in our societies, productive competitiveness, equity and citizenship.

The new challenges currently facing adult education demand links at all levels, in the approach to the contents as well as in the confrontation of the task. It must overcome the isolation and be opened to interdisciplinary approaches and coordination with other strategic sectors.

Considering the weakness of formal adult education, UNESCO/OREALC conducted a regional research<sup>22</sup> between 1988 and 1991 to characterize the current status of the formal basic public education of adults and to propose a development project. The study was carried out in the framework of the REDALF in 13 countries of the region: in Brazil, Colombia, Costa Rica, Ecuador, El Salvador, Guatemala, Honduras, Mexico, Nicaragua, Panama, Peru, Uruguay and Venezuela, through secondary and primary data. The primary data were obtained through various instruments applied to a probabilistic sample of the participants on the education: to pupils, teachers and directors of teaching centers.

The study characterized basic adult education as primary education highly scholastic but of low quality, with administrative dependency on the regular daytime primary school and determined by the values and standards of the school. BAE meets the needs of urban-poor youths without capacity to demand an education in a poverty reproduction circle; their teachers work in inadequate occupational conditions and they have not had opportunities for appropriate training. Offering BAE, concentrated in the cities, does not answer the demand, and reaches a minimal proportion of the adults who are illiterate or have incomplete primary teaching.

In the 13 countries participating in the study, the enrollment of BAE is close to 3 million, while the potential demand is estimated at more than 150 million. In spite of all, the state and formal BAE continues to be considered by many youths and adults as the possibility of completing their education.

This research is the first regional consultation for the participants in basic adult education. There are not similar precedents in this area and it shows a path that would have to be traveled to achieve the design of appropriate reforms starting from what exists now.

As a counterpoint to this research and starting from its results, OREALC decided to highlight, through systems, innovative experiences in adult education that they could open new routes to the countries.

Thus, there was another way to focus on the quality of adult education. Systematizing the experiences constitute a process of reflection of pedagogic practices and of its organization, starting from certain determined criteria in a proposed design. For the educators, it turns into a valuable tool to produce knowledge starting from their own practice. It was also attempted to indicate a form of investigative work that could be replicated by educators in different contexts.

In this area, the experiences that deviate from the school model and, in particular, from the traditional offering of basic scholastic and compensatory adult education, are considered innovations. They are conceived as "the creation of a new order, the adding of value to customary practices; the alteration of the sense of conventional educational practices." The experiences are innovative with respect to particular situations and specific aspects.

In such systematizing, three basic categories to characterize the innovations were proposed: structure, process and function<sup>23</sup>.

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<sup>22</sup> Messina, Graciela: *La educación básica de adultos: la otra educación*. Santiago: UNESCO/OREALC, REDALF, 1993.

<sup>23</sup> Based on Radcliffe Brown, A.R.: *Estructura y función en la sociedad primitiva*. Barcelona: 1986. Reference in: Messina y otros, op.cit. The following paragraphs follow this document.

The structure refers to the innovative proposal, to its fundamental options and to the dimensions that it takes (the kernel of the innovation, components, relationships among them, nature of the innovation, degree of internal generalization of the change, links of the innovation to the socio-cultural context).

The process alludes to the time and pace of the adoption of the innovations, to the mechanisms through which the innovation is carried out and developed, and to the roles assigned within the program to the different participants and components. Through the process it was sought to observe how the innovation spreads from its origin and in each one of its components and the contribution of each one of them to the whole.

The function refers to the already mature proposal, which shows itself in its components, in its effects or impacts on the components and in the whole.

The experiences considered as innovations refer to the education and work areas (in Honduras and Argentina), community education (in Colombia and Chile), bilingual intercultural literacy (in Ecuador) and education for drop-out children or children outside the system, from 10 to 14 years of age (in Venezuela).

According to the analysis, the experiences constitute innovations "because of their capacity to respond to populations not attended by the traditional BAE and by shortening the distance between the education offered and adults' daily life."<sup>24</sup> However, this does not mean that they are finished proposals or that they are different from traditional ones in all aspects.

In any case, it can be said that such systematizing, in the implied process as well as in the systematized experiment, highlights fundamental aspects of a new adult education.

### **Education and productive work**

The link between education and work is an unavoidable point in a formulation of a curriculum intended for youths and adults: furthermore, various authors propose that work constitutes an axis, around which should be articulated the contents and skills<sup>25</sup>. This seems to be more important to the extent in which it is discovered that the requisite skills for working in a modern society are the same that are needed for daily life.

The topic of the relationship between adult education and work has been present for years in the countries of the region, but conclusive steps along this line have still not been taken.

Between 1986 and 1988, sponsored by OREALC in the framework of the UNESCO/Government of Spain cooperation, a regional research of 76 programs associated with education and work was carried out<sup>26</sup> in 13 Latin American countries (Bolivia, Brazil, Colombia, Costa Rica, Chile, Ecuador, Guatemala, Honduras, Mexico, Nicaragua, Peru, Uruguay and Venezuela).

The research adopted a descriptive design and a fundamentally qualitative methodology of data analysis was employed. Furthermore, 15 case studies in 13 selected countries were carried out. In this way, macro and micro structural analysis were combined. Among the conclusions, it would be fitting to highlight the diversity concerning proposals, conceptions and implementations.

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<sup>24</sup> Messina, G. and others, op.cit.

<sup>25</sup> P. Daniel Weinberg: Educación de Adultos y Trabajo Productivo. Last published in: UNESCO/UNICEF: *Educación de Adultos en América Latina ante el próximo siglo*. Santiago: 1994. Pp. 188-219.

<sup>26</sup> The technical coordination of this investigation was in charge of Silvia Schmelkes, of the Centro de Estudios Educativos de México.

The programs are sustained by so different proposals as the originated in the Popular Education and in the theory of human capital; there is consensus, at least in the language, in relating learning and behavior, but essential differences in the form in which this integration is defined.<sup>27</sup>

The link between education and work and how it can influence the content of the curriculum has been discussed in recent years at international meetings in the framework of REDALF<sup>28</sup>; however, the topic must be deepened in studies of wider scope.

### **Education directed toward indigenous populations**

The studies and the discussion of this topic have been centered on what the proposed education means to different and subdued ethnic groups. Because of this, its focus has been on the problem of the cultural diversity mixed with that of colonization and that of the weight of the dominant language -even in the countries with large indigenous populations- and the social demands based on the conditions of poverty.

The contributions of linguistics, anthropology and pedagogy -precisely regarding the assumptions and methodology of popular education- have contributed to the development of an approach called "intercultural bilingual education," which is conceived as a "respectful and balanced dialogue between cultures,"<sup>29</sup> that has served as base for educational programs in Peru, Bolivia and Ecuador, addressed to Quechua, Aymara and Guaraní populations.

However, the reflection and discussion continue about topics such as "identity" and their relationship to the language (with its development and with its loss); the identity and the nationality; the implicit rationality in the various cultures and in the advances of modernization; the implications of ethno-education, especially the learning starting from a culturally different cognitive style.

A diagnostic study of indigenous education in five countries of the region, Bolivia, Ecuador, Guatemala, Mexico and Peru, was developed between 1988 and 1989 in the framework of REDALF. The study was intended to provide specification elements for the Regional Program of Bilingual Intercultural Education for indigenous adults and children, in accordance with its high-priority policy lines and national strategies, human resources training, didactic materials, research and international cooperation.

Special reference would have to be made to the studies and projects dealing with indigenous women<sup>30</sup>. For example, starting from the bilingual intercultural education approach, supported by UNESCO in the framework of the Principal Education Project, between 1987 and 1990 experiences were developed to emphasize civic education for indigenous women in Ecuador and Peru.<sup>31</sup> The programs defined the cultural identity as the basis of the development and they could be included within what has been called action-research.

However, in spite of the many advances in this field, it must be recognized that an appropriate educational proposal for and with the indigenous populations is still a pending task in Latin America.

### **Women's education**

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<sup>27</sup> Schmelkes, Sylvia (coord.): *Postalfabetización y Trabajo en América Latina*. Pátzcuaro: OREALC/CREFAL, 1990.

<sup>28</sup> In Nicaragua, in 1993 and in Montevideo, in 1994.

<sup>29</sup> Moya, Ruth: *Heterogeneidad Cultural y Educación: encrucijadas y tendencias*. Paper prepared for the Encontro Latino-americano de Educacao de Jovens e adultos trabalhadores, organized by UNESCO, UIE, MEC, SEF, INEP. Olinda, 27/9 to 1/10/1993.

<sup>30</sup> See, for example: D'EMILIO, Anna Lucía (Comp.): *Mujer Indígena y educación en América Latina*. Santiago: UNESCO/OREALC, 1989.

<sup>31</sup> Jáuregui, M. Luisa: *Hacia una propuesta de Educación Bilingüe Intercultural para la Mujer Indígena*. In: *La Piragua. Revista Latinoamericana de Educación y Política*. Nr.6. Santiago: CEAAL, 1993.

Traditionally, in Latin America, women's concerns have been neglected in political and social life as well as in education.

However, the actions to reassert the rights of women have multiplied in the region in the last decades, as well as the educational actions intended for them and gender studies, all of which has contributed to improving the situation of women in the occupational, educational, legal, political and social fields<sup>32</sup>.

Studies in recent years show that, in education, the difference in schooling that existed between men and women is being reversed. In some countries it can be observed that women, especially in the young population, exhibit somewhat more schooling than the men. This happens in the countries of South America and in the English-speaking Caribbean.<sup>33</sup>

A large part of the research in this field has followed processes of popular education addressed to women, many times rural and/or indigenous, and it takes place in the field of the action-research.

In the framework of REDALF, educational processes with indigenous and rural sector women have been supported, and the exchange, the diffusion and the systematization of experiences in this area has been promoted.

In addition, a wide empirical research on female illiteracy in urban poor, rural and indigenous contexts in Chile<sup>34</sup> was supported. It used a reading and writing instrument, interviews and groups of discussion in connection with problems seen as important. A vast study of the data of the census of 1992, especially in the contexts selected for the study, was also carried out. One of its results was the identification of literacy levels in the selected populations and the weighing of the contexts in the performance of the skills.

It is also worth mentioning the elaboration of a systematization of innovative experiences in non-formal education directed toward poor women and mothers with scarce resources, which comprise literacy programs, income generation, health and environment.

The study,<sup>35</sup> commissioned by UNESCO to a Peruvian sociologist, examines the methodology employed in the programs, the persons who execute them and the intervention strategies. The study concludes that the most successful experiences are those that include, in addition to the economic dimension, a personal dimension: an increase in self-esteem and self assertiveness of the women.

### **About a future agenda: some pending challenges**

In each one of the thematic trends pointed out, there are strong demands to research to indicate ways and means to allow adult education to be relevant to the needs of youth and adults, particularly those living in poor and marginal urban areas in our Latin American Societies. This becomes more urgent considering the accelerated changes that affect them.

The greater challenges are part of the topic quality of learning, which includes learning strategies as well as characteristics of the specific populations and requirements of the respective contexts. The basic learning needs indicated in Jomtien should materialize in curricular proposals that guarantee to the youth and adults an active management, creative and critical, of the condition of their life, in the personal, familiar, occupational and social areas.

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<sup>32</sup> Zúñiga, Myrian: Educación de Adultos como espacio para el desarrollo y fortalecimiento de las mujeres de los sectores populares. In: UNESCO-UNICEF: *La Educación de Adultos en América Latina ante el próximo siglo*. Santiago: UNESCO-UNICEF, 1994.

<sup>33</sup> Schiefelbein, E. y S. Peruzzi: *Oportunidades de Educación para la mujer. El caso de América Latina y El Caribe*. In: *Boletín Proyecto Principal de Educación*, Nr.24. Santiago: UNESCO/OREALC, 1991.

<sup>34</sup> Letelier, M. Eugenia: *Analfabetismo y Mujer en el Chile de los 90*. (In press.)

<sup>35</sup> Ruiz, Patricia: *Género y Desarrollo*. (In press, 1994)

The positive relationship between education and indicators of quality of life, demonstrated in many studies<sup>36</sup>, has nuances that should be deepened. Also, it would be necessary to focus on the topic of difference<sup>37</sup>. The successful experiences - duly systematized - must serve as referents for others; those with greater difficulties must be studied to discover the factors that blocked the process or the results.

The concern with quality demands a study of the different contexts and their specific characteristics, to provide elements for differentiated curricular proposals that could answer effectively the needs and forms of learning of the various groups.

It also demands a practical study of the skills needed to perform in the different areas of life.

With this purpose, there is much research pending, particularly in the field of the work requirements affected by the changes in technologies as well as in organization.

In addition, the topic of learning strategies and cognitive processes that has been developed under the influence of *piageteans* and *post-piageteans*, and which has been influenced by the sociology of knowledge and anthropology, must continue being investigated, especially concerning the learning of reading and writing and mathematics.

The learning strategies take on still greater importance in the education of rural and indigenous populations.

Besides, it is necessary to add depth to the skills acquired by young and adult people, in order to offer them adequate programs that make possible a better social and occupational insertion level. The topic of skills is part of the topic of functional illiteracy.

There still have not been enough studies done about the implications, in various areas, of the fact that the great majority of the adult population may have had few years of schooling or it may have had a schooling lacking in quality, and whose learning may not have been relevant to facing the multiple requirements that an environment in constant change presents.

It is important to study this situation from a double perspective: from the point of view of the adults whose social and occupational area is rapidly becoming more complex, and from the positions of power, with a view to design productive educational and occupational policies.

Due to the introduction of modernity "packages" present in the communications media, bureaucratic procedure, and many aspects of daily life, the context in which the functionally illiterate live is made more demanding and complex for all. Reading and writing, the capacity to analyze, to deduce, to understand different forms of reasoning, have become increasingly necessary. At the same time, the "modern" attitudes of autonomy, flexibility and creativity in the solution of problems, the capacity to search for alternatives, the skills demanded for teamwork, for effective communication are required in assorted productive and social fields.

Because of this, it would be necessary to carry out studies that establish the principal features of functional illiteracy in Latin America, that could offer valid information to improve the educational processes intended for adults and to adopt measures to relate the skills that the population effectively possesses with those required for an effective entrance in the social and occupational field.

The results of such studies can help to discover concrete traces related to the learning retained from basic education and those necessary in adult education, for the teaching-learning process of reading, writing and mathematics. Moreover, the researches can be helpful for the design of policies and educational strategies and for the adoption of measures that affect the conditions that generate functional illiteracy.

Together with the abilities required to perform well in contexts undergoing modernization, a field that cannot be neglected is opened: that of attitudes and values. The new liberal economic model brings with it an accentuation of competitive attitudes needed "to survive" in the "jungle" of the market.

However, the cultural patterns of our Latin American peoples include as basic values solidarity and justice. The importance that the topic of human rights has had in the region, spurred by transgressions, especially in times of dictatorships, shows the strength of this cultural configuration.

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<sup>36</sup> Muñoz, C.: *Los insumos educativos en las estrategias para satisfacer las necesidades básicas de aprendizaje*. In: UNESCO/IDRC: *Necesidades básicas de aprendizaje*. Santiago: 1993, p. 299.

<sup>37</sup> García-Huidobro, J.E.: *Comentarios*. In: UNESCO/IDRC, op. cit., p.308.

The study of values and of their development in contexts of strong social and economic inequality will be able to provide elements "to set" the curriculum on an ethical base.

These aspects are framed also within the topic of building a citizenship that knows how to develop in diversity and to face the challenges that come from modernization as well as those which stem from the conditions of poverty of vast sectors. Productive transformation "with equity" demands powerful efforts along this line.

In another field, the modernization of the educational systems, a task that the Education Ministers proposed for themselves in their most recent meeting in Santiago in 1993, brings to educational research in general topics that should be approached, especially in connection with the decentralization processes<sup>38</sup>, such as autonomy levels, resources administration, relationships among different administrative and political systems: the local, the regional; evaluation of decentralization experiences; the relationship between school and community; modern management styles; functions of the State.

In this line, the research in adult education is inserted in this dynamic of reform and faces the same challenges to achieve an efficient administrative structure for this mode, so that it can answer to the local and regional requirements that are combined with global education projects.

However, although there has been some progress in this sense, the greater challenge is, through the research itself expressed in many ways, to achieve the creation of a theoretical body that gives coherence to the multiple experiences that are carried out, that contributes to provide criteria from which these can be evaluated and offers a base for the construction of renewed proposals. For this, it will be necessary to activate the networks of information exchange and to link the countries through regional projects.

In this way, it will be possible to advance in a common conceptual language that allows the establishment of an intellectual community in Latin America, connected as well to the rest of the scientific community.

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PIIE-CIDE-REDUC: *La investigación educacional latinoamericana de cara al año 2.000* Seminar report. Pta. of Tralca (Chile), June, 1993.

## Research Trends in Adult Education in Latin America

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### Introduction

The purpose of this paper is to give an overview of the main concerns that have been dealt with through research on adult education in Latin America over the last 20 years. This is meant to serve as a basis for proposing a research agenda in adult education for the following decade.

It is, however, necessary to contextualize the object of our study in the recent historical developments in Latin America. These, as we will see, will help us understand research trends in the last few years and research needs for the near future.

As a consequence, this paper is divided into two parts. The first part analyzes Latin American research in adult education in the last 20 years, and attempts to make a summary of its main findings. Also, new research trends are highlighted. In the second part, the Latin American situation, with emphasis on the changing scene, is analyzed. The shift in paradigms regarding adult education, which are a consequence of recent Latin American development and perspectives for the near future, is dealt with. The paper concludes with some suggestions for a research agenda in adult education in Latin America for the near future.

### I. Recent Research in Adult Education in Latin America

#### a. The Seventies

In 1982 two studies were published that analyzed research production in Latin America during the seventies. The first was based on 1000 abstracts published by REDUC (Ochoa and García Huidobro, 1982). The second is an analysis based on different sources (Schmelkes, 1982).

These two studies find that theoretical studies regarding adult education -- its general conception, its conditions for implementation and success, its global effects, its possibilities and limitations -- are mainly carried out by international organizations and foreign agencies. On the contrary, applied research, oriented mainly towards the operation of adult education programs, is the main concern of national governmental institutions. This is a question in point, since in a way it is an indication that what is in fact orienting adult education in the region is emanating from external institutions. On the other hand, there is information that indicates that a large part of this research is not circulating in Latin America (an important proportion is published only in English). This makes it difficult for research development to really constitute a dynamic process of accumulation of knowledge. It can also be observed that agencies in charge of operating adult education, especially government agencies, are mainly interested in very pragmatic and applied research. It is in the universities and in the private research centers where more interpretatively oriented studies are being carried out. But this indicates a problem of relationship between what is being actually carried out and what is being the object of research in adult education.

The second study points out that there is practically no basic research on adult education going on in the region. In part this explains the conceptual problems in adult education:

- The fact that adult education is still undefined and that the boundaries between adult education and other forms of education with adults (non-formal education, popular education) are unclear.
- The fact that we do not know how adults learn. Little progress has been made since Freire published his *Pedagogy of the Oppressed*. We are facing this question through the practice of trial and error, and we still deal educationally with adults based on pedagogical principles relative to children.
- The fact that we have not been able to systematize and generate knowledge from the growing experience in adult education in Latin America. There are a great number of reports, descriptive studies, evaluations that have no relationships between them and that are difficult to recuperate.



- The fact that we still know very little about the relationships between adult education and the broader socioeconomic and political environment. We do not know what the role of adult education is in local and regional development. We continue to make different assumptions regarding the relationships between education and development (the former is the independent, or an intervening variable, or, more recently, a dependent variable), but the foundations for each of these assumptions are not always clear. We know little about both immediate and long-term effects adult education has among its beneficiaries. And we are still vague regarding the situations that generate and explain illiteracy.

Without this basic knowledge, what we do in adult education is, to a certain extent, random and uncontrolled.

Applied research, on the contrary, is abundant. Under the broad category of adult education we find, in any specialized library, a great amount of models and projects, administrative schemata, descriptions of institutional experiences, reports of courses for educational agents, texts and manuals for adult education. The growing interest of governments in efficient and low-cost programs is a plausible explanation of this apparently unbalanced development of research on the subject. Such is the number of this type of "studies", that any attempt at systematizing them involves considerable effort and expense. Financing of adult education research, however, is still concerned mainly with efficiency.

Evaluation research is also abundant. It is important for financing institutions to assess the results of the programs that are being supported. However, few efforts have been made to analyze and compare the results of these studies. Apparently, there is less interest in understanding and explaining the results of adult education than in improving program implementation. This is supported by the fact that experimental research is scarce and insignificant in the region. Programs are designed in an office, implemented directly and, in certain cases, results are assessed. But there is a clear absence of theoretical frameworks or working hypothesis to orient these programs, and in many cases, mortal leaps are taken between ideas and actions, which possibly explains the failure of many of the programs that had created great expectations.

The study concludes that basic research on adult education should be reinforced and a clear relationship should be established between basic and applied research.

#### **b. The eighties.**

In 1986, a team of researchers from CIDE (REDUC-CIDE, 1986) reviewed recent research in adult education related to the objectives of UNESCO's Major Project for the region, one of which is eliminating adult illiteracy by the year 2000.

The review starts out by pointing to the fact that the meaning of adult education in Latin America is quite different from that prevailing in industrialized countries. Permanent education is not really an issue, as understood in industrialized countries. In Latin America, adult education has to do with the needs of great masses of adults to constructively face a situation of poverty and exploitation. In many cases, adult education has to be directly related with survival needs and strategies.

Studies on literacy, once more, are very few in the region. Quoting a study carried out by CREFAL in 1978, out of 266 studies dealing with adult education in the region, only 23% had to do with literacy. Emphasis is again made on the exceedingly operational approach to research. The majority of the studies are related with action projects and aimed at improving them or making them more efficient. Regarding literacy studies, the theoretical vacuum present in adult education studies in general is also characteristic, as well as studies that relate literacy with more global social and economic characteristics and developments. Literacy campaigns are found to have different effects when carried out in politically stable situations than when taking place in societies undergoing a general process of transformation. In the first instance, Latin American research underlines the very poor results of campaigns carried out in stable situations. But research in both Cuba and Nicaragua on literacy campaigns carried out after the respective revolutions reveals a very different situation. The notable success of the Cuban campaign, and the less successful but still impressive results of the Nicaraguan crusade, confirm the fact that illiteracy is not caused by a single factor, and that eliminating illiteracy implies a strategy that transforms global social relationships. Among the elements contained in such a strategy, political will is foremost, in the sense that the struggle for literacy must be understood within the context of a broader framework of policies dealing

with development and social change. Another important element is national mobilization and active participation of a variety of social actors.

This study also reviews research carried out in Latin America on adult education for peasants and Indians, where illiteracy and basic learning needs of adults are concentrated. Three strategies are identified: programs aimed at substituting the lack of basic education among peasants; programs aimed at offering technical education; and programs oriented towards social and organizational training for the improvement of the quality of life among peasants and Indians. Among the first, radio schools stand out, especially during the seventies, as a means for reaching large and disperse populations with basic education programs. Evaluation research on the results of radio schools, however, points out that these do not seem to be as important as would have been expected. Enrollment decreases after a first stage of motivation. Effects are selective - the better-off students are the ones that take advantage of the programs.

Among the second type of programs, dealing with technical training for peasants, research points out that educational results are the consequence of the presence of programs that modify other central aspects of peasant production and productivity. Effects of these programs are also selective. Training programs aimed at improving peasant employability in urban regions have also had very poor effects - formal education is the important factor for employability.

Programs for social training and organization have apparently been more successful than the other two types of programs. However, their success is related to the actual improvement of production and marketing conditions.

Regarding the Indian population, researchers agree on the inadequacy of educational programs destined to these groups. They propose popular education programs aimed at empowering Indian groups and at strengthening their cultural identity and their native language. However, little research is available on what type of programs are in fact successful with Indian population.

Finally, this study reviews research carried out in the field of distance education for adults. During the eighties, radio schools were transformed and converted into more non-formal and popular education programs. Two types of approaches are evident: those more instructional in nature, and those seeking empowerment of peasants and Indians. The first type of programs using radio offer open courses. The second type have a very strong field work ingredient and incorporate local educational agents. Radio, when combined with face-to-face educational situations, plays a motivating and cohesive role. It is not easy to assess the impact of these programs. There are quite a number of evaluations, but information is not conclusive.

Several studies have reviewed research carried out in the field of popular education in Latin America. As is well known, inspired by Freire's experience in Brazil and by his well-read writings on education and concientization, popular education expanded throughout Latin America, carried out by social and non-governmental organizations, during the late sixties, and is still a very strong movement in the region. Though many experiences were systematized during the seventies, it is in the eighties when research on popular education really takes hold.

The development of a special pedagogy of popular education is evident in Chateau and Martinic's (1989), as well as García Huidobro's review of the Chilean case (1989), where popular education developed strongly during the military regime. Popular education projects have a central action project which is not always educational, but which always includes an educational component. There is always a pedagogical relationship that is characterized by flexibility in the boundaries between the educator and the learner. Dialogue and a horizontal relationship between the actors are the main characteristics of this pedagogical relationships. The educator starts out from the experience and knowledge that the participants have, emphasizes a critical reflection on immediate reality, and develops specific actions aimed at strengthening organization and at solving pressing problems of the group of participants.

Of course, the political significance of popular education is highlighted. Popular education experiences are viewed as a means for constituting social actors and popular movements. The political orientation of popular education experiences has changed over time. At first, these activities were aimed at strengthening the popular movement in such away that power could be taken over by the majorities. More recently, however, and due mainly to the fact that this objective has always been too distant, and to the development of popular education under severe military dictatorships in many Latin American countries

during the seventies and early eighties, the focus is placed on the creation of a new culture that increases the power of active and conscious social actors in society.

Popular education is in no way homogeneous. Context, as well as the origin and possibilities of the social actors involved, give place to very different forms and purposes of popular education in the Region. Nevertheless, comparative research has discovered some elements that are generally present in popular education activities. Some of these are the following:

- Education is understood as an indissoluble relationship between knowledge and practice. Reflection on practice is a source of knowledge, and new knowledge is an input for improved practice.

- Education must be linked with the solution of specific problems affecting the daily life of participants.

- Popular education is a social activity. The group is the unit of education. The educational subject is a social subject. Organization and collective activity is the expected result of popular education. Strengthening popular organization is its main objective.

- Nevertheless, personal growth and development is always part of the aims of popular education. This is seen as a consequence of participation. Personal growth is manifested through the acquisition of new knowledge and skills as well as in the increase in the ability for personal expression, social interaction, self-esteem and self-assurance.

Many interesting and important results have been documented as a consequence of popular education. Many of these have to do with the action projects that are not educational in nature, even though they have an educational component. Thus, for example, popular education projects have indeed increased productivity, have empowered local agents for dealing with basic health problems among the population, have strengthened local organizations for the solution of nourishment problems, etc. In so doing, they have also constituted participatory spaces for social expression and the satisfaction of basic needs, and thus a platform for personal growth. These qualitative results, however, are very localized. Popular education programs necessarily imply a very intense and prolonged relationship with relatively small groups of people. Thus, while documented results are certainly stimulating, quantitatively the impact of popular education is necessarily very small. Neither practice nor research have yet discovered the possibilities and conditions for going to scale in popular education projects.

Research in adult education in Latin America has in fact increased over the years and has grown in depth and quality. However, research on research in adult education is not being carried out with as much enthusiasm and interest as in the seventies and the beginning of the eighties, and statements on the present state of adult education research in Latin America are more difficult to make. Nevertheless, it is possible to say that, in spite of both quantitative growth and qualitative improvement in research in adult education within the region, many of the problems that over the years have been detected regarding research in adult education in Latin America are, to a certain extent, still present to date. This is true regarding the difficulties in establishing a conceptual framework in adult education. Basic research is still scarce, and we still know little about how adults learn and about the relationships between learning and practice. There is still a tendency of expecting too much from adult education. At the same time, adult education has been consistently losing its political priority, and this has also affected research and the research community, which at least in some countries, such as Mexico, is rapidly dwindling.

The embryonic development of research in adult education in part explains the weak relationship that exists between research and the processes of decision making and policy implementing in the region. Researchers and implementers tend instead to criticize each other. Policy-makers accuse researchers of carrying out extensive, costly and untimely studies. Researchers accuse policy-makers of excessive pragmatism. Researchers are more interested in what is being innovated outside the educational system. The educational system centers adult education activities around compensatory programs. Innovations within governmental adult education has been scarcely supported by research. Research on compensatory education has been, to a large extent, abandoned (save pragmatically oriented research for greater efficiency). Adult education researchers have concentrated on popular education or other social alternatives to official adult education.

Nevertheless, there are some consistent findings stemming from research in adult education. In what follows, we will try to summarize some of these findings.

### **Some Consistent Findings of Research on Adult Education in Latin America.**

#### **a. General Aspects.**

Perhaps the most significant result of a review of recent literature in adult education in the region is the fact that dissents are being dissipated. Different ways of conceiving adult education are still present in practice. However, in discourse consensus is the norm. These agreements strongly affect traditional interpretations of adult education.

The different forms of conceiving adult education are closely linked to different ways of understanding poverty and the process of development. Thus, the conception as development as a pre-determined path, unilinear, with the urban industrial model as the goal, contrasts with the vision of underdevelopment as internal and external dependence, and of development as a plural, self-determined process which respects cultural diversity (Vera Godoy, 1987).

From the first viewpoint, adult education is seen to fulfill the role of incorporating the poor to the process of development. In the past, the main orientations of adult education (fundamental education, functional education, community development) share the viewpoint that economic underdevelopment is related to irrationality in the cultural sphere. Thus, traditional mentalities must be changed, and adult education must train for development (Barquera, 1985: 22-23)). It assumes that progress implies an extension of technology and capital. Adult education must therefore fulfill a complementary role, geared towards extending knowledge and skills in the use of modern technologies (Santuc, 1984: 3-4).

From the second viewpoint, adult education contributes to the emergence of a popular subject, with the objective of empowering social organizations (García Huidobro, 1986: 63). Against dependence, liberation of the people must be achieved. Adult education is an auxiliary towards this aim, since it contributes to fostering an egalitarian society centered both on persons and on organizations with a certain control of the social transformation process, in such a way that social alternatives may emerge from popular groups themselves (Santuc, 1984). Adult education is understood as a means for awareness, for reflecting on practice, for fostering group autonomy, and for democratization (García Huidobro, 1984: 12-13).

Although the perspective of incorporating adult education to the main trend of national development still prevails in governmental adult education in our countries, it is interesting to observe that educational discourse of the governments regarding their activities in adult education has begun to incorporate conceptions that belong to the second viewpoint just described. Respect for adults, the need for taking their knowledge and experience as a starting point and going back to them, participation as both form and content of educational activity, organization as the way to relate what is learned with daily life needs, are all aspects that are to be found as basic orientations for adult education programs.

While dissention decreases, consensus increases. Even though it is impossible to say that there is one prevailing viewpoint regarding what to do and how to do it in adult education, there are a number of premises, findings, conceptions, and orientations of adult education that are gradually being accepted by a greater number of actors in the field. Some of these are the following.

1. In Latin America, adult education cannot be separated from the reality of poverty. Adult education activities must be closely related with the most urgent and vital needs of adults. The growing poverty of large sectors of the population in Latin America can no longer justify merely ideological actions. Actual transformation of living conditions must take place or be visualized as a result of adult education activities (García Huidobro, 1986: 60).

2. Illiteracy and low schooling of adults must be understood as a symptom of a complex reality of poverty. Poverty is not an individual phenomenon, but a structural one. As such, poverty must be combated in an integral manner, and overcoming it supposes important structural transformations (Borsotti, 1984: 176-177).

3. Overcoming poverty requires the transformation of the present asymmetrical relationships between social sectors. This means empowering popular classes. Though possible transformations may be only gradual, adult education should support them (Latapí, 1985: 287).

4. Democracy, and thus participation, is a condition for overcoming poverty. Education is important for training for democracy and for promoting participation as a way of life. (Arancibia, 1990:11).

5. Basic learning needs of popular sectors in Latin America are enormous; they coincide with the magnitude of poverty (García Huidobro, 1986).

There has also been some progress regarding the role of adult education from the perspective of combating poverty. It is widely accepted that adult education is not the motor of development. We also understand that illiteracy and the lack of schooling is a consequence rather than the cause of poverty. But it is not possible to understand the improvement of the living conditions of the large majority of the population if these sectors do not overcome their condition of exclusion from universal knowledge and from the basic skills that make it possible for them to actively participate in the processes of transformation of realities that affect them socially and in their daily lives. Thus, education is the ingredient without which a process of development lacks the necessary quality that makes subjects active agents of their own transformation and that of their social and political environment.

### **b. On adult education in general**

Consensus regarding the importance of adult education for meeting basic needs of poor adults contrasts with the little relative importance governments are giving it. One of the indicators of this little importance is the percentage of the educational budget dedicated to these activities. In the region in general, the percentage is under 2%. Adult education still does not represent a real, effective component of the countries' development policies (García Huidobro, 1986). Diagnostic research coincides on the fact that adult education is not being attended to with the quality and quantity that the problem merits. Some of the reasons for this are the following:

- The reduction of governments as a consequence of neo-liberalism and structural adjustment policies. Social expenditure in general has suffered the consequence of these policies, but expenditure in adult education has suffered disproportionately.

- Recent efforts in the struggle against illiteracy have concentrated in universalizing primary education (Rivero, 1993).

- The economic crisis which most of the Latin American countries are going through since 1980 has not only affected adult educational expenditure, but also the resources of the adults, who have less time and energy to participate in adult education programs.

- While it is true that NGOs have grown as a consequence of the retirement on the part of the government of many activities among the popular sectors of the population, their approach is micro-social, and while the results of their educational activities are important qualitatively speaking, quantitatively the impact is not noticeable.

Diagnostic research criticizes classical adult education programs carried out by the governments. These do not correspond to the needs of adults. Activities are stereotyped in rigid literacy and basic education models that are inadequate for the great diversity of contexts (Latapí, 1986:1). Activities are carried out in a disintegrated way (Carrillo Reina, 1982). Traditional emphasis on literacy and basic education as the principal the educational supply for poor adults is severely questioned. Adults prefer other types of programs, or educational programs that are associated with other programs that meet their most urgent needs (García Huidobro, 1986: 62).

The fact that governments have overemphasized these traditional activities in adult education explains the very weak response of the potential demand. The focus on compensatory programs has in general produced a uniform model of adult education which is unable to respond to the enormous diversity of educational needs of adults in the different countries of the region.

One of the most accepted principles of adult education is that it should respond to the needs of the beneficiaries. If this is so, one can understand that quantitative literacy goals cannot be met when there are illiterates who do not feel the need for literacy, others that do not want to become literate, and others that cannot do so. Basic education centered on a single model aimed at certifying primary or secondary education cannot be expected to be successful. Also, literacy cannot be conceived separate from basic education and other educational activities, which is the way in which adult education generally operates in our countries (Latapí, 1986: 2-3).

The potential demand for adult education is heterogeneous. Different groups in the population have different learning needs. Especially important are the Indian population, peasants and migrants, inhabitants of urban marginal regions. Within each of these groups, in turn, the young population and women have specific learning needs.

Another of the most accepted principles of adult education refers to the need for the adult to become an active participant in his/her own learning process. The main actor of adult education is the adult him/herself, and he/she must be able to make decisions relative to his/her education. Classic parameters of administrative efficiency, based on the attainment of quantitative goals, hinder the achievement of this purpose. To fulfill this basic principle, the focus of adult educational activities has to shift from the government offices to the adults themselves, supported by their educational agents (Latapí, 1986: 3-4)}

Diagnostic research formulates another important criticism to traditional activities in adult education in Latin America. This is the lack of professional instructors and, in general, of professionals in the field of adult education (Carrillo Reina, 1982). A large part of adult education programs in Latin America rely on volunteers which are, in the best of cases, only superficially trained, unstable, and not necessarily motivated<sup>1</sup>.

Another question posed by diagnostic research regarding governmental adult education programs refers to their lack of continuity. New government officials cancel programs and start new ones without the needed assessment of previous progress. Agreements with universities and research centers and other institutions are generally short-lived (Rivero, 1993: 134).

Research has made it clear that there is no real social demand for adult education. The characteristic of the demand is its political weakness (Rivero, 1993: 134), its slight ability for formulating and negotiating their needs. More recently, this characteristic has been aggravated by the fact that the potential demand for adult education has been heavily affected by the economic crisis. It can be said that in Latin America, supply precedes demand in adult education, and the few who respond to the supply lack sufficient basis to demand the type of education they require, and generally accept what is offered (Schmelkes and Street, 1990).

Research has also consistently discovered lack of quality in adult educational programs, as well as their inadequacy in specific cultural and linguistic contexts and vis a vis specific age groups (the young population) and women. Personnel training is noticeably deficient (PROMEDLAC IV, 1991: 19-20). Supply is substandard. Adult education operates without infrastructure and professional instructors.

### **c. On literacy**

Literacy has generally been conceived as a technical activity, isolated from the context in which it is used. This is one of the main reasons why literacy activities on the part of the government have such a small impact<sup>2</sup>. Literacy activities carried out by governments have centered on the transmission of an instrumental code. Its complexity, the fact that literacy in fact refers to the learning of a technology for expressing thought and for communication, as well as of a series of social practices (Kalman, 1993), is not recognized. The result is that literacy activities do not result in a real, continuous and diversified use of the written language by the beneficiaries.

This inefficiency of literacy activities has been pointed out by regional research in many instances and from years back. The study of the effects of literacy campaigns and programs across the region have made it clear (Gallardo and Cuéllar, 1985: 36-37; Muñoz Izquierdo, 1985: 37-39; Schmelkes and Street, 1991; INEA, 1988: 82).

Reading has been the focus of literacy activities, and very little importance has been given to writing, even though writing is perhaps the aspect with more liberating potential in literacy training (Infante, 1983: 138). More changes can be initiated and induced through writing than through only reading. The

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<sup>1</sup> In the case of Mexico, for example, students about to finish their university education must fulfill a compulsory "social service" for six months without pay. Adult education recruits many of these students. Thus, even though they are considered "volunteers", motivation is not necessarily guaranteed.

<sup>2</sup> Latapí and Ulloa (1993) have discovered, in the case of Mexico, that progress in the struggle against illiteracy in the last ten years (1980-1990) is completely due to increases in the number of persons who completed at least fourth grade and who reached adulthood (15 years of age or over) during this period.

assumption has been that the same abilities are needed for both reading and writing, but this has been found to be untrue (Szwed, 1988: 308).

Also, even though literacy programs always declare that they include basic arithmetic, much less importance is given to this aspect. This is so in spite of the fact that research has discovered that the need for arithmetic is strongly felt by adults in the popular sectors of the population. The need to be able to defend oneself from exploitation in commercial and work transactions is, in many instances, foremost among adults wanting to learn (Avila, 1990; De Lella, 1988).

And in the case of Indian populations in Latin America, where illiteracy is concentrated, the intercultural aspect of education is not taken into account. Local contents are not included. In general literacy is carried out in the national language. (PROMEDLAC IV, 1991: 20).

#### **d. On Post-literacy**

During the last decades, post-literacy has not been significantly relevant in Latin America (Rodriguez Fuenzalida, 1982). Neither have significant activities been carried out in the field of "literizing" the environment. Research on post-literacy, as a consequence, is practically nonexistent.

#### **e. On Basic Education for Adults**

We have mentioned that basic (formal) education for adults has been the principal way in which governments in Latin America have taken on the challenge of facing educational backlog. A recent study on basic education for adults in the region shows clearly that there is no social demand for this type of service among the adult population of the region. Enrollment is concentrated in young urban population (Messina, 1990: 52 part II). This regional study and many other specific studies (Picón Espinoza, 1985: 56) point to the irrelevance of the content matter of basic education for the theoretical demand. Contents are not related with the basic needs of adults; they are not oriented toward work or the labor market; the pedagogical methodology is transferred from that used in school (vertical, memoristic); the programs disregard the specific characteristics of the population with which they work. Besides, basic education for adults has a very small enrollment and is highly inefficient. It is a second class education. Research results seem to point consistently to the fact that formal basic education for adults is not the adequate way of facing basic learning needs of adults in Latin America.

Several studies point to the fact that the teaching-learning style that takes place in basic education programs is in contradiction with adult learners. There is a clear cultural distance between the discursive style of basic education for adults and the specific interests of the students (Messina, 1990: iv-v). It transmits the official culture without relating it with the culture of each community. It is centralized, homogeneous, inflexible. The methodology employed is traditional, based on rote learning, individual work and the promotion of intellectual skills. The search for an integral development of the learner, that should take into account affective, corporal and ethical aspects, is absent. What predominates are minimal programmatic activities (Messina, 1990: 30-31, part II).

In spite of the fact that one of the accepted functions of adult education is to foster employability, adult basic education reproduces the type of knowledge that has little to do with technological progress and with changes taking place in the work place. It is not related with social and economic development processes.

As we have said, the demand for this type of education concentrates in young urban population. However, programs and contents are not designed accordingly, and therefore do not respond to the specific needs of this population (García Huidobro, 1994).

Statistical analysis of progress achieved in facing the backlog in basic schooling are eloquent. Mexico is a case in point. The number of adults (15 years or older) without complete primary education in Mexico is 20,200,000. In 1988, 63,000 adults completed primary education. In that same year, the number of persons without primary education increased by 871,000 (INEA, 1991). The officially accepted efficiency of primary education for adults is 32%. There are studies that show that average theoretical time for finishing primary education in the adult education system is the equivalent of between 6 and 12 years (Muñoz, Rodriguez and González, 1984: 25).

The situation of poverty in the conditions of supply, which we have referred to, also affect basic education. It operates with borrowed resources, both infrastructure and teachers. Teachers are not

adequately trained. Their salaries are low (or nonexistent), and instructors are in general not satisfied with their working conditions. This is another indication of the marginal role adult education is given within the educational system (Messina, 1990: 1-29).

### **New Research Trends: Conceptions and Approaches**

#### **a. On Adult Education in General**

In his article on changing conceptions of adult education, García Huidobro (1994:30) looks at recent research and the way it illuminates new ways of conceiving adult education in the Region. In reviewing the development of research on popular education in Latin America, he concludes that popular education has developed in close relationship with the theory of social change of the left in Latin America which is now living through a process of renovation which is rich in perspectives, but very radical in terms of revising its analytical categories. In the process, popular education has moved from a time when it disregarded its strictly educational responsibilities (actual learning outcomes) in favor of adopting obligations in the field of political socialization, to a concern with questions having to do with educational quality and an emphasis on educational results. Educational research is beginning to shift from an emphasis on the supply side of education to an emphasis on the demand side: the participants, their needs, their learning process and their quality of life. Few but very influential studies, such as Martinic's study in Chile on the participant's point of view (1988), surprises popular educators and researchers by bringing to light the participants' reasons for participating in popular education activities. Popular education has defined itself as pursuing social change, fostering a horizontal educational relationship, and being based on the daily life of the participants. However, the participants don't perceive these objectives with the same importance. Instead, they look for quite different things. Learners participating in popular education suffer daily the experience of instability and exclusion, and what they want is social integration to the existing social order. The popular educator wants horizontality. But the learners give the educator authority and see him/her as a means of becoming a part of his/her institution, and through it, of the larger society. The popular educator speaks of working on the daily life of adults, but the adults transform the educational space into a very special space, a space different and distant from a very painful daily life which is, at least for a little while, forgotten.

García Huidobro (1994:29) considers that this in no way means that popular education must abandon its basic principles. However, the distance between viewpoints on the part of the educators and on the part of the learners shows that the paths of adult education are more complex than what we had expected. This new look towards the demand side of the educational equation might contribute to put educational supply in a condition for improving the lives of popular sectors.

Recent writings on adult education in general approach the need to design adult education on two different levels, not necessarily in sequence: the immediate, emergency level, focusing on the solution of survival needs (health, nourishment, housing, employment or self-employment, production and distribution); and the long-term level, focusing on the satisfaction of human needs and on developing personal and social potentials (Latapí, 1985: 292-295). There is a clear trend in Latin America on centering adult education on the needs of persons and groups. Adult education is conceived as playing an instrumental role. It should attend, from an educational standpoint, a large range of problems (Rivero, 1993). The notion of competence is brought to light. The question that adult education should respond to is: what competencies do adults need to better satisfy their survival needs, which are a starting point to the possibility of assigning to adult education the role of transcending survival needs in order to attend other basic human needs (Schmelkes, 1994).

This perspective on basic needs and on the competencies needed to satisfy them puts the interests and requirements of learners at the center of adult education (Castillo and Latapí, 1985: 56) and at the same time emphasizes quality: the need to define qualitative criteria to assess learning outcomes. Adult education has to recover its importance and its social confidence, and this will only be achieved if and when adult education can demonstrate its ability to face and solve important educational problems (García Huidobro, 1994). The search for quality in adult education must focus on actual learning by adults.

#### **b. On Literacy and Post-literacy**



While during the last decades research has questioned the social, political, and economic effects traditionally attributed to literacy, the fact that literacy is an unquestionable social need is clearly recognized. Literacy is definitely not the only factor that leads to a better quality of life, but it is an intervening factor in this process. Literacy is clearly recognized as a basic learning need. We live in a literate society, and mastery of reading, writing and arithmetic is an instrument for participating in society and for further learning (Schmelkes, 1994; Kalman, 1993).

However, when to initiate literacy activities, and how to go about them, are questions that are still being debated. The history of literacy campaigns shows that these have not achieved the expected results when they have not occurred in a broader context of social transformation. The process of teaching literacy to adults is now recognized as a complex activity which requires a systematic effort and a professionalization of literacy agents (Schmelkes, 1994). Literacy cannot be limited to the transmission of an instrumental code.

### **I. Literacy and post-literacy: Concepts under scrutiny**

It is now widely accepted that effective demand for literacy is concentrated in urban and young populations. Beyond these populations, literacy does not represent a felt need, and adults find it difficult to maintain motivation levels high enough to go through the literacy process during the period needed to obtain the basic tools of "functional" literacy. This has led several scholars and some activists to consider it futile to conceive the educational process with adults as something that must necessarily begin with literacy training. It is not necessary to be literate to be able to participate in adult education activities (Salgado, 1984: 8-22). There are a number of educational processes that are closer to what is known as "post-literacy" that respond more to the needs and interests of rural and Indian communities (Picón Espinoza, 1987: 43), and even of some urban sectors of the population. Literacy, however, can be understood as the goal to be attained. Thus, literacy should become the consequence of educational programs dealing with health, housing, and other activities which are nearer the interests and basic needs of illiterates (Coloma, 1984: 10).

Literacy, then, as well as adult education in general, should be closely related with the basic needs and interests of adults. It can be understood as a need that develops in the process of solving basic problems or of satisfying interests and not, as we used to think before, as a necessary instrument to achieve these goals. It would also be clear that it is, to a certain extent, useless to insist on literacy when mastery of the written language is not a felt need among the beneficiaries. Literacy will become a felt need when the population finds real spaces for social, economic, and political participation in which mastery of the written language will allow them to improve the quality, and thus the results, of their participation (Schmelkes, 1994).

If this is so, there is no basis to continue to assume that literacy and post-literacy are sequential (Kalman, 1993). At least among certain populations, it seems more convenient to start out with "post-literacy" activities, in order to reach more effective literacy programs.

Latin American experience, as well as that in other countries, has clearly shown that the process of avoiding the relapse to illiteracy is more complex than that of achieving literacy. Being so, post-literacy activities, be they previous, simultaneous or following literacy programs, should center on modifying the environment that reproduces illiteracy. Post-literacy, therefore, implies the existence development projects and programs that transform social conditions (Nagel and Rodríguez, 1985: 117; Schmelkes, 1994).

Post-literacy, then, as a concept, is severely questioned, especially when it is understood as an addendum to literacy programs that are limited or incomplete. The concept of post-literacy should be included in that of literacy as such. Also, post-literacy should not continue to be understood as a set of activities aimed at avoiding the loss of the newly acquired skills. This leads to conceiving post-literacy as a closed and finite stage, in the same way that literacy has traditionally been understood. What is needed, instead, is an adult educational system that is capable of relating work and study and of helping to face diverse and changing needs of the different groups of adults that require educational attention (Salgado, 1984).

### **ii. Literacy is not drawing letters or sounding them off.**

In the past, literacy has predominantly been conceived as a fundamentally technical activity aimed at offering a useful instrument for any circumstance or culture. It has been assumed that, once this instrument is possessed, the consolidation of the mastery of the written language may be completed by the learner, on his own, through practice (Kaplún 1990:49). However, recent psycho-linguistic research, noticeably that carried out by Ferreiro, has strongly questioned this viewpoint. Ferreiro (quoted by Kaplún, 1990: 49) makes a difference between the learning of the mechanics of reading and writing - the learning of the code -, and the acquisition of the **function** of the written language. She points out that, under conditions where contact with the written language is scarce (such as the case of illiterate adults), learning the mechanics of reading and writing does not necessarily or automatically conduce to the appropriation of the function of reading and writing.

Function refers to the meaning of reading, to the possibility of using reading and writing to act in the world (Kalman, 1993; Carraher, 1988). One must train for the acquisition of the function of the written language. If this is not done, adults do not really learn to read and write. What has been called "functional illiteracy" is not only due to the lack of further opportunities for practice, but also to the fact that the literacy training that was given did not allow for this appropriation of the function of reading and writing, nor did it lead to the construction of reading and writing practices or to incorporating the uses of reading and writing in social activity. The code can be transmitted, but the function, the meaning, is something that the learner has to discover by him/herself, has to experience personally (Kaplún, 1990: 49-51).

### **iii. Literacy and functional literacy are one and the same thing.**

From what we have said so far, it seems clear that learning to read and write means incorporating the written language to daily life, internalizing it, using it to communicate and to relate socially; the person who has learned to read and write has to be able to read what interests him/her and to write what he/she wishes to communicate. Literacy is thus transformed from an act of transmission to an act of discovery, interchange, communication (Kaplún, 1990:53), and social participation. Literacy is, therefore, functional literacy, or it is nothing at all.

Literacy is not a simple matter. A trend is clear: from its conception as a technical activity, toward understanding it as a phenomenon that must be placed in context and that has, in each context, a certain social value and a certain place in the communicative life of a community (Kalman, 1993: 25).

### **iv. Education in mathematics for adults**

We have mentioned that arithmetic is never given the importance discourse seems to attribute to it in literacy programs, in spite of the fact that training in arithmetic is more of a felt need for adults in Latin America than literacy training itself. There are not many studies that deal with this matter, and fewer still are those who seek alternatives for promoting the learning of mathematics among adult populations. However, the studies that are available are important because they are coincidental in their results.

Avila (1993:60) and Mariño (cited by Avila, 1993) have carried out basic research with illiterate adults on the way they solve mathematical problems. It is clear in their studies that adults construct mathematical knowledge in their daily activities, mainly through dealing with money and in activities involving measurement. In a recent study, Avila (1990) establishes three levels of mathematical knowledge among illiterate adults, which seem to depend on the complexity of their daily practices, mainly with money. These illiterate adults have developed strategies for solving problems with the four arithmetic operations. These strategies do not use the conventional algorithms. Carraher (1991) finds a very similar situation among children who work as vendors on the streets. These children also attend school. When at work, these children are able to solve complex problems involving multiplication and subtraction. However, when the same problems are posed to them in school in the form of conventional algorithms, they are unable to solve them. Calculation strategies among youngsters and adults that have to deal with money are based on addition. This operation underlies calculation among unschooled adults.

These preliminary studies allow researchers to affirm that there is no adult that has had contact with money that does not know some mathematics. The more complex his/her contact with money, the more sophisticated - and also effective - are his/her solution strategies. What they lack is the code that

would allow them to use conventional algorithms and to communicate the solution of simple and complex mathematical problems.

Thus, it seems that mathematics, as well as the notions of the written language, are learned when used in inter-relational situations, when they constitute an actual individual and social practice. However, few adult education programs heed the fact that adults have a mathematical knowledge. Avila (1993) finds, for example, that in the case of Mexico, it wasn't until 1986 that a primary education textbook for adults recognizes and, to a certain extent, bases its contents, on the fact that adults have constructed a mathematical knowledge. However, it does not yet incorporate the mechanisms for solving problems that adults use in their daily social practice.

### **c. On basic education for adults**

The traditional activity of adult education carried out by the governments in Latin America has, as we have mentioned, been centered on compensatory programs aimed at certifying primary and secondary education. At present, this conception is being seriously reviewed, and is actually being surpassed in practice (García Huidobro, 1994) due to the recognition that adult education must stem from a more inclusive perspective that admits very diverse educational activities. In surpassing this very limited conception of adult education, basic education for adults is being associated with different domains of competencies, from health care to the possibility of furthering learning. This trend was, of course, clearly reinforced with the World Declaration of Education for All (Jomtien, 1990). The whole of life is taken as a framework (Rivero, 1993: 195). A central criteria for defining what is basic has to do with relevance of what is learned (UNESCO-UNICEF, 1994)

In the academic world, as we have already mentioned, there is a clear agreement regarding the deficiencies of the basic adult education model that predominates in Latin American countries. This agreement has led to the development of a series of proposals on how to understand what is "basic" among illiterate or scarcely-schooled adults. These proposals share the following principles:

- 1) Basic education for adults must start out from the activities and the needs of each group of adults. It should be non-formal and flexible, it should not be based on uniform programs, contents, and evaluation procedures, and it should not over-emphasize certification. There is no adult education without high motivation. The desire for learning must be related to a conviction that what is learned is useful for improving one's life and that of his/her family and community. When motivation is low, it is an indication that the program is not responding to the adults' needs (García Huidobro, 1986; Costa, 1977: 28-29).

- 2) It is necessary to recognize that adults possess knowledge as well as individual and collective experiences that must become sources for learning. At the same time, adult education activities must be based on the basic principle that effective learning takes place through discovery and through action aimed at solving problems affecting the individual or the group. Self-learning has been promoted by many governments in Latin America. However, experience has made it clear that adult education cannot base its activities on the assumption that self-learning is possible among individuals whose conditions for study are not adequate (Schugurensky, 1987: 199).

- 3) The strictly sectorial way in which adult education has proceeded during the last decades must be radically revised. Adult education must establish clear working links, especially at the local level, with other government offices and other institutions (Picón Espinosa, 1985). It is also necessary to link adult education with formal education activities for children (Messina, 1990: 3, part V).

- 4) Adult education for adults must be quality education. It cannot continue to be a second class education. Quality calls for centering activities on the learner and his/her learning outcomes, within each specific context.

- 5) Adult education must be understood as an instrument towards the improvement of the quality of life. It offers elements without which the struggle for this improvement would be more difficult (Schmelkes, 1990).

Proposals for re-thinking basic education for adults, then, emphasize the importance of relating it with the actual possibility of improving the living conditions of the learners. These possibilities are diverse among regions and sectors of the population. Many of them depend on the active presence of other government offices or of other agencies and institutions. Basic education for adults, then, cannot be massive or uniform. A need for substituting this view for a more flexible and local one, able to respect the

adults such as they are, their culture, their knowledge and experience, and able to design with them the educational requirements to be able to face the desired changes.

#### **d. On training for and on the job (or for self-employment)**

Adult education cannot ignore the world of work. If we are consistent with the notion that adult education must respond to the needs and interest of the population, the fact that work constitutes one of the main concerns must be recognized. The problem is how to face this challenge.

Training for work among illiterate or scarcely schooled adults is a different matter entirely than carrying out this activity with the population that has traditionally benefitted from training programs in general. This population is either already employed or employable in the formal sector of the economy, or else they possess the means of production which constitute the required platform for increasing productivity. Here, however, we are dealing with persons that work in the informal sector of the economy, or whose means of production are insufficient to produce the income needed to maintain a family.

Even so, programs that have aimed at training for work and production have been based on what seem to be mistaken assumptions. One of these assumptions is that training for work must be closely adapted to the needs of production and must offer the world of work the human resources it requires in adequate quantity and quality (De Ibarrola, 1988: 50). This assumption is false, because the world of work is not transformed as a consequence of work training programs. The world of work develops according to its own logic. It is therefore a mistake to train persons for the needs of a determined occupational structure. Instead, workers must be trained for a dynamic occupational heterogeneity. They should acquire the know-how needed to access, organize, transform and critically generalize their abilities, instead of mechanically putting them in practice (Rivera, 1994: 70).

Another mistaken assumption has to do with conceiving the needs of production as being defined by a homogeneous productive structure, given the fact that the productive structure in most Latin American countries is enormously heterogeneous. It is heterogeneous in three different aspects: regarding the relationship between production activities and capital accumulation; regarding the degree of formalization of the labor relations; and with respect to the technical and hierarchical division of economic activity and the type of technology. In a heterogeneous structure such as this, different logics coexist regarding training conditions for obtaining work. The training requirements, in each case, are entirely different (De Ibarrola, 1988).

The relationship between training for work and employment is contradictory: there is a growing demand for training, but an insufficient and unequal employment structure. Training for work actually does not seem to depend on the capacity for identifying pedagogical characteristics for universal needs (De Ibarrola, 1988).

García Huidobro (1994: 37) considers that one of the weaknesses of adult education has been the fact that it has over-extended its promises. This exceedingly optimistic conception of the potential effects of adult education has proceeded both from the educators and from society. And this has been true in the case of employment. Given the specific reality of unemployment and underemployment that affects large portions of our populations, the temptation to rely on adult education for solving it has been ever present. García Huidobro recommends abandoning and actively combating these excessive demands on adult education which are false and inviable. Adult education's contribution to the solution of problems such as these is indirect. Education can be considered as a necessary condition, but never as a sufficient one. In the same tone, Weinberg (1994: 188) warns against believing that the mere inclusion of productive work in adult education programs will constitute a magic solution to the problems of unemployment.

A recent review of programs that relate education and work among illiterate and scarcely schooled population in several countries in Latin America (Schmelkes, 1990) found that the model that predominates is the one that aims at incorporating marginalized population in main-stream economy within each country. Programs expect that the individual student will find work in the formal sector of the economy as a consequence of the program itself. However, the fact that the incorporation of the marginal population to the formal sector of the economy is not a social phenomenon is well documented.

This study also found two different ways of understanding the relationships between education and production among the programs studied. There are two types of programs: those that are centrally productive in nature, and those that are centrally educational. In the first type of programs, education

accompanies and lends support, through training, to production objectives. It is the production objective that indicates the content and pace of the educational activities. Education clearly plays an instrumental role, but, since a space for educational activities is defined, this space is usually taken advantage of and strictly instrumental education is surpassed. In these programs, education starts out being instrumental, but it goes beyond the instrumental aspect to include educational activities aimed at consciousness raising, training for organization, value formation and training for self-management. In contrast, centrally educational programs have more difficulties in their operation. They have not been able to incorporate literacy or basic education activities in relation to training for work. It would seem that educational activities have greater potential when they support production activities than when they define their activity as the process that will allow that to occur in the future. Education's role in the transformation of economic and social conditions is only theoretical (Schmelkes, 1991: 95-97).

This critical diagnoses of programs aimed at training for work have given way to pointing out the need for overcoming instrumentalist and productivist approaches of many training programs. Training should not be mistaken with teaching single sets of very specific skills, given the dynamics and heterogeneity of the world of work in our country. Training should prepare the student for a variety of interrelated economic activities. Adult education should incorporate the culture of work and of production in its programs. This means fostering knowledge and understanding of production, of work processes; creating innovative attitudes that translate into daily practices and that allow for the appropriation of a technological knowledge which is permanently changing; developing not only occupational skills, but social and organizational skills as well (Weinberg, 1994: 201). Programs that train for the workplace must include literacy and mathematical training related with work, as well as other complementary educational contents aimed at extending the opportunities for personal development.

#### **d. On other aspects of adult education**

A few words should be said about research carried out concerning more specific, but not less important, aspects of adult education.

One first nucleus of concern that stems from the critical studies made on the development of adult education research in Latin America has to do with the way adults learn, and with pedagogical methods for literacy and adult education in general. A recent review carried out by Schmelkes and Kalman (1994) on these issues found very few recent Latin American studies. Main general standpoints on how adults learn and how they should be taught have been in circulation since the beginning of the eighties, and have not progressed too much. Thus, Londoño (1983) speaks of the need of taking the knowledge and experience of adults as both a starting point and a goal: the goal is to enrich this knowledge and experience. Several authors insist on the importance of valuing the adult as a person, creating a respectful learning environment, building up the adults' self-esteem by recurring to direct experience and demonstrating their ability of facing and solving problems. Motivation is considered a key issue, and must be insured both by relating the educational processes to the needs and interests of the adults, and by building up individual and group self-esteem. Kaplun (1990: 53), insists on the fact that learning is personal discovery, re-creation, re-invention. An educational process, he says, is not constructed with speakers and listeners, but with interlocutors: with speaking learners, and not with silent receptors. The influence of Freire is very evident, but not much progress is discovered over the last ten years.

Progress is more evident in the field of literacy and mathematics. In the first instance, several developments stemming from findings on research with children have proven to have a great significance for understanding the adult literacy process (Ferreiro). In the second instance, few and small, but very consistent studies have opened up interesting avenues for dealing with training in mathematics with adults (Avila, 1990-93; Mariño n/d, De Lella, 1989; Carraher, 1988).

Another important aspect of adult education is curriculum. Curriculum studies have emphasized the need to discover alternative paths to formalized curriculum that adapts the formal school programs for children. Cultural elements, the incorporation of popular knowledge, the problems of daily life, human interactions should be able to become learning objects and sources of learning experiences (Magendzo, cited by INEA, 1990). This widespread recognition for the need of alternative curricular models for adult education have given way to several curricular proposals that are worth studying more closely (Latapí, 1986; Schmelkes, 1994; CREFAL, 1991; Ruiz, 1987, among many others). However, these

proposals have not been implemented, and there is no follow-up or evaluation information that could strengthen or give feedback to the assumptions that sustain them.

Closely related with curricular issues is the aspect of learning materials in adult education. The classic book that puts together the key papers and presentations made in a regional meeting that dealt with materials for adult education (Rodríguez, Vargas, and Salgado, 1981) is still the main reference in Latin America. Little of this level of importance has been carried out in the last decade. In the field of technology and adult education, however, we do find one very valuable recent study (Kaplun, 1990). Kaplun indicates that after a period in which great expectations were placed on the use of media for adult education, and after several disillusionments, we no longer speak of teaching literacy or post-literacy through the media, but with the support of the media. Distance education, for example, critically accepted the unidirectional transmission model that the media seemed to impose. Instead of taking advantage of the media, it became dependent on them. The result was the use of the most "bankarian", traditional and ineffective pedagogy. In the case of radio schools, it was discovered that the population assigns radio and television a different function from that of instruction. Thus, it became clear that education should try to be present in a large range of media, in informal (rather than formal or non-formal) education.

To the question of how to use the media creatively in a process that is only educational if it is dialogical and participatory, Kaplun replies with a series of communication experiences that are bi- and multi-directional. These experiences make the learner a transmitter as well as a receiver of messages. Some examples of these type of alternative communication strategies are popular newspapers, radio-dramas created collectively, participatory television programs, educational tele-fora, cassette-fora and small communitarian radios.

With respect to the evaluation of adult education, this is a field in which we in Latin America recognize that we know very little and around which many mistakes are committed. It is a broad field, since it goes from institutional evaluation, passes through the follow-up and systematization of specific programs, and includes assessment of learning outcomes. There is very little theoretical and methodological production (Picón Espinosa, 1983; IASPE, 1987).

Regarding external assessment of individual learning outcomes, the main criticism refers to the fact that we have not yet been able to reach a definition with respect to the competencies that adult education should develop and to the indicators for measuring their achievement (UNESCO, 1993: 20). In spite of this, adults are frequently evaluated, and it is a fact that these evaluations have a strong determining influence on what and how it is taught. Other problems of evaluation in adult education that have been pointed out by research are: the fact that it is considered as a neutral tool; the fact that what is carried out in adult education is taken from evaluation mechanisms for assessing learning outcomes of children in formal education; the fact that development of evaluation in adult education has not kept pace with the changing conceptions of adult education itself; the fact that very little importance has been given to the evaluation of adult education from the perspective of the learners.

We are not satisfied in Latin America with what we have been doing in evaluating adult education. Even though the importance of evaluating is clearly recognized, there are strong inconsistencies between the objectives of adult education and the type of methodologies and instruments that are available for evaluating. There is a suspicion that much more is done and achieved in adult education than what is known about it, due to the poverty of our evaluative efforts.

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Latin America is certainly a rich source of new knowledge being constructed around adult education, and has been so for several years. Many of the difficulties that we have observed regarding lacunae and lack of relationships between different types of research and between research and decision-making are gradually and slowly beginning to be overcome. Still, many aspects of research in adult education need to be strengthened. Others have to begin to develop as both the broader context and the changing conceptions of adult education transform. We will turn to these aspects in what follows.

## **II. New Challenges, New Needs.**

### **a. Global changes in the overall context of Latin America.**

The Latin American context is rapidly changing. These transformations represent new challenges to social, political and economic activity, as well as new demands to education in general and to adult education in particular. Many of these challenges require the exploration of new avenues in adult education, and they address new requirements for research.

Perhaps the most important aspects for understanding the profound transformation of Latin American societies are the following:

**i. The crisis and structural adjustment policies.**

After the lost decade, many Latin American countries decide to take on the neo-liberal strategy and to adopt severe structural adjustment measures. The result of both the crisis and the adjustment measures is an increase in poverty. Adjustment policies are biased against the poorest groups. The gross regional product had a negative growth during the eighties, while population grew at a rate of 2.2% annually (Ffrench, 1989: 394). Per capita income in 1989 was 8% below that of 1980. The informal sector of the economy grows rapidly. The number of persons living below the poverty line increased from 136 million to 183 million between 1980 and 1989, and the population living below the absolute poverty line increased from 62.4 million to 88 million in the same time span. In relative terms, the poor represented 41% of the population in 1980, and 44% in 1989 (Comercio Exterior, 1990).

This situation has particularly affected the rural, the Indian, and the urban marginal populations. Within these groups, the situation of women is particularly critical.

The problems that the peasants face in critical times such as these can be summarized as follows (Schmelkes, 1994b):

- A clear trend towards a greater concentration of land and wealth in the countryside, due to a liberalization of the land market and to the cancellation of virtually all agrarian reform programs.
- The ever increasing difficulty of surviving out of what a peasant family produces in its own plot of land. Semi-proletarianization and proletarianization are the consequence, but even this way out is diminishing due to unemployment in urban areas and to technological modernization in the large agricultural enterprises.
- The cancellation of State programs destined to the peasants. As a consequence of adjustment policies, the State has practically abandoned the peasants: agricultural extension has drastically diminished, financing for peasant production has practically disappeared. Effects are also being observed in the field of health and education.

The Indian population consists of around 30 million persons belonging to 400 different ethnic groups. They share all of these problems, but in addition they must face those that have to do with cultural domination, discrimination, cultural devaluation, and a consequential process of deterioration of their languages and their culture.

In the case of the urban marginal population (see Rivera, 1994), Latin America faces the reality of a rapidly growing "popular economy" geared toward survival and based on the continuous exercise of the working capacity of this sector. This sector of the economy has proven to be the most dynamic of all sectors: from 26% in 1980 to 31% in 1985. In some metropolis (Bogotá, Lima), it represented 35% of the economically active population. Recent estimations in Mexico City indicate that more than half of the economically active population is in the informal sector of the economy. Work under these conditions is unsure, unstable, and without any type of protection. Life in urban marginal areas is extremely difficult. Urban marginal regions have grown rapidly and chaotically. In the case of new urban areas, services are of course non-existent. The life of the inhabitants is a constant struggle to assure their small piece of land and to have access to basic services. Transportation is deficient, and many hours must be spent in travelling daily to places in the cities where some economic activity may be carried out.

Under these conditions, women have increasingly entered the labor market or are participating in productive activities (see Zúñiga, 1994). In rural areas, it is mainly the women that stay in the communities and take charge of agricultural production while the men sell their workforce in other regions. Estimations say that 50% of peasant income is generated by women. Women working for a salary have increased from 18 to 36% in the last 30 years. From one third to one half of the workforce in the informal sector of the economy is constituted by women. In both rural and urban areas, women's participation in economic activities is added on to their responsibilities in the home.

Poverty, then, though not a new reality, is both growing and acquiring new and very diversified physiognomies. It poses the first and foremost challenge to adult education.

## **ii. Urbanization**

In the last three decades, Latin America changed from being a predominantly rural to becoming a predominantly urban continent. Poverty is now concentrated in the cities. This poses a double challenge to adult education: on the one hand, it must develop adequate strategies to offer educational services massively in urban areas. On the other hand, it must prove capable of multiplying micro-level activities in the very disperse and diversified rural and Indian communities.

## **iii. Globalization**

The world economy is globalizing. Latin America cannot stay out of this process. It must become competitive in the world market. However, Latin America is emerging from a very profound economic crisis. And before the crisis, its economy grew thanks to protection measures that gave way to industrialization oriented toward the local markets.

Competitiveness in the world market is a challenge that Latin America must face in the following decades. This implies some very radical structural transformations in technology and the organization of production. It brings with it an opening up of international boundaries and, with it, an invasion of staples and products that are produced in first world countries where technology, the organization of production and its scale have made it possible to bring unit costs to very low levels.

The process of globalization is painful. It brings with it the destruction of a great number of small and medium-sized industries, which are very numerous and create the most jobs, but which are unable to compete in prices with products coming in from first world countries. Only those enterprises survive that are able to restructure their production process and/or to find external markets for their products. In the case of agricultural production, the situation becomes critical. Basic staples are produced in highly modern and large-scale agricultural enterprises in first world countries at a much lower cost per unit than in the small and often mountainous peasant areas in Latin America. It is cheaper to import agricultural products than it is to produce them. The impact of this situation on peasants in Latin America is only just beginning to be perceived, but a critical situation can be foreseen for the near future.

The process of globalization implies accepting the rules of the game of a free market. Thus, the State must abandon previous protectionist measures aimed at compensating differences in means and conditions of production while at the same time offering incentives for the development and evolution of economic activities.

The anticipated result of these transformations, at least for the short term, is an acute process of concentration of wealth - it is the large enterprises that are or will be able to survive the transition period - and a negative impact on employment, both in industry and in agriculture.

The challenges that the globalization process brings with it go beyond the possibilities of adult education. Nevertheless, adult education must be present and capable of offering educational supports to all the attempts for facing these challenges on the part of both government and other instances of society. The CEPAL-UNESCO document (1991) places knowledge at the base of structural economic transformations. Again, knowledge by itself is unable to create jobs or to distribute wealth. But though knowledge is not a sufficient condition for equitable growth, it is definitely a necessary one. Education in general, and adult education in particular, must be capable of fulfilling this necessary condition.

## **iv. Democratization and the formation of participatory citizenry.**

Fortunately, there is an unquestionable transition towards strong democratic societies in Latin American nations. Competitiveness in the international scenario, in fact, is seen to be inviable if the societies that are competing are not democratic and if wealth is not adequately distributed (CEPAL-UNESCO, 1991).

Strong democratic attitudes, practices, and structures constitute the only possible counterbalance to the negative impact of the liberalization of market forces. The role of education in



general, and of adult education in particular, in forming in and for democracy, is perhaps, at the present moment and for the near future, one of its most important challenges.

### **b. Adult Education Strategies: Views for the Future.**

Results of adult educational activity during the last 30 years in the region, the evolution of adult education practices during this period, the main findings of research carried out in adult education, and the changing context of Latin American societies, are all factors that give way to reviewing adult education's role as well as its procedures. In an attempt at organizing the strategic proposals that are recently emerging, I highlight the following:

#### **i. Political importance and social significance of adult education.**

We have mentioned that the importance the governments give adult education in Latin American countries is far from corresponding with the magnitude of the potential demand for adult education. Budgets are limited and have decreased over the last twelve years. Material and human resources for adult education are both quantitatively and qualitatively clearly insufficient. Society has not shown interest or capacity in putting pressure on the system to improve this situation. The sectors of society who could benefit from adult education services do not place adult education among their main priorities, or have difficulties in formulating their demands (Schmelkes and Street, 1991; Rivero, 1993).

Adult education needs social confidence and prestige (García Huidobro, 1994). This has to do, of course, with the amount of resources allocated to adult education. But it also refers to institutional professionalism and responsibility. Adult education activities should have the continuity, stability, and autonomy that have been absent in the past. Each country should have a permanent and stable institution with the financial, human and administrative resources needed to be able to meet the required goals (Ministerio de Educación del Perú, 1988: 28).

The main strategy for increasing political importance and social significance of adult education is probably to place the problems and the possible solutions at the center of a national discussion, with the participation of the governments and of representative sectors of society. The definition of common objectives, based on previous experience and research findings, would be expected as a result of this discussion (UNESCO, 1993: 38). The role of the different sectors of society in facing the problems and implementing the solutions should be clarified. Assessment criteria leading to social accountability of adult educational activities would hopefully be defined (Carrillo Reina, 1982; García Huidobro, 1994).

#### **ii. Integrating educational subsystems**

Two different types of integration are necessary. The first refers to the integration between the formal educational system for children and adult education. The second refers to the necessary integration of different adult education activities.

School has represented a much more efficient vehicle for reducing illiteracy than adult education. The very small progress made by adult education makes it clear that there is no guarantee of eliminating illiteracy if schools do not adequately fulfill their literacy role. The large percentage of children that leave primary school without becoming literate will continue to produce a large illiterate adult population. Literacy, therefore, must be seen as a two-pronged activity (Ferreiro, 1987: 7-8): with adults (remedial) and with children (preventive). This is a strong argument in favor of relating adult illiteracy with school failure. Adult illiteracy affects children's schooling. Evidence regarding the importance of the literacy of mothers, especially, on infant mortality rates and on school attendance and perseverance is growing (Rivero, 1989: 11, 14). There should therefore be no constraints for schools to work with adults, or for adult education to work with parents around the competencies needed for helping their children through schooling and for being able to place articulated demands for quality education for their children.

The need for the second type of integration, among different adult education activities, stems from the fact that it seems to be futile to continue to conceive adult education as a set of disconnected activities. As we have seen, literacy cannot be separated from "post-literacy"; basic education for adults must be understood as a flexible and very diversified spectrum of learning possibilities; the practice of literacy is a goal of all of these activities. Thus, adult education should respond to a more global and

flexible model (Latapí, 1986: 4). Formal, non-formal, and informal methodologies should possess common objectives and reinforce each other.

### **iii. Diversifying the supply of adult education.**

Social and potential demand for adult education is enormously heterogeneous in the region and within each country (Vargas Vega, 1982). This is the reason why central, uniform and massive programs have shown such poor results. Given this vast heterogeneity of the demand, no set of operational models can be satisfactory (Latapí, 1986: 3).

Diversification of educational supply refers to the ability of offering educational programs and contents related to specific needs of each group or sector of the population. These needs change with time, and adult education should be able to dynamically serve these changing needs. This diversified supply of educational programs and contents may be articulated in a flexible model of basic education for adults in such a way that, if the learners so desire, they may have access to certification through the demonstration of acquired knowledge and skills.

Diversification also has to do with the ability of the adult education system to respond to the common needs of important sectors of the population, such as women and youth, peasants, Indian populations, migrant workers, etc.

### **iv. Linking adult education with adult problems and with other institutions.**

The widely accepted principle that adult education must be able to respond to the problems adults face and must offer elements for their solution has to be made operational. There are four possible ways of linking adult education with the solution of felt and pressing problems:

- One possibility is to define a problem to be solved with a certain group of adults, and to educationally accompany its collective solution.
- Another route is to carry out adult education activities where development and transformation processes are on-going.
- A third possibility is for adult education to give support to specific productive or welfare projects.
- Lastly, many problems can be solved directly through the actions of the members of the group and their families.

It is not a question of choosing one of these, but of exploiting all of them.

Another principle that has to be made operational has to do with the need for destroying sectorial barriers in adult education activities. Adult education must recognize the existence of adult education acting or potential agents in other government instances or in social associations or organizations (persons working in health, in agricultural extension, etc.). The responsibility of adult education can be either to join them or to train them.

Adult education should also be linked to the world of work. We have mentioned that the experience that Latin America has carried out up to now is not satisfactory. Nevertheless, a review of the literature seems to establish a few general principles for linking adult education with the world of work:

- Adult education should not design programs mechanically adapted to specific occupational structures, and neither should it raise false hopes among the learners.
- Training for work should never be confused with offering specific skills for a particular job. This is something that employers have been doing and can do rapidly and effectively. Instead, training for work should be understood as a much broader activity, which incorporates literacy training and mathematics and which develops an understanding of the world of work, of labor relationships, of technology and its relation with human activity, and of the meaning of work in personal development.
- The link to the world of work must recognize the heterogeneity of the labor market; the different needs of the informal sector of the economy, of small and middle-sized enterprises, and of large work sites, in the urban areas; of peasants who possess means of production, those that might develop productive activities related with large agriculture enterprises, and those that survive from selling their work force (Schmelkes, 1994b).

In any case, adult education should accompany and potentialize productive transformation programs or programs aimed at improving working conditions and productivity, instead of assuming that these processes will develop as a consequence of adult education activities.

#### **v. Participation of Civil Society.**

Governments cannot resign to their responsibility in adult education. However, governments should not take on this responsibility on their own. The role of social organizations and NGOs has to be clearly recognized, and strong steps should be taken towards their more active participation in the pursuit of common goals (Ministerio de Educación del Perú, 1988: 28; Picón Espinosa, 1990).

One of the strategies toward the diversification of educational supply is through the participation of civil society. NGOs have numerous successful experience in decentralized models of adult education. Social organizations represent the interests of their members and have taken on, at certain important moments, the operation of educational programs. The potential role of employers in adult education activities has not been sufficiently exploited. Universities have played a very secondary role in this matter, while it is clear that they can take on greater responsibilities.

#### **vi. Quality: Emphasis on adult learning and on their participation in the educational process.**

This is perhaps the central concern among adult educators, both in governments and in popular education experiences. The actual learning by adults must become the center of gravity of adult education. This has various implications:

- The adult is the most important actor of his/her own learning process. Therefore, adults must be able to participate in decisions concerning the educational process, including resources and their destinations.
- The life and needs of the adults must become the focus of adult education activities.
- Adult education experiences, therefore, should have greater autonomy, but at the same time, should be accountable to the adults and to the educational system as a whole.
- Quality implies relevance. The notion of quality excludes any type of imposition, particularly those impositions that are disrespectful of social and cultural values of the community.
- Quality implies assessment. Learning results of adults must be adequately assessed and made public.

#### **vii. Quality: Professionalizing adult education.**

This last strategy actually represents a condition for the effectiveness of many of the other strategies mentioned. The lack of professional personnel at all levels, but particularly among the educational agents, represents the principal bottle-neck for progress in building up more relevant, efficient and qualitative educational services. The way we have been defining adult education, and the requirements we have been placing on its operation, describe a very complex activity. It is not possible to achieve any of the necessary transformations in adult education if we do not begin to professionally train adult educators.

#### **Conclusion: Suggestions for a Research Agenda on Adult Education**

This paper has tried to develop three sources for outlining a research agenda on adult education in Latin America. In the first place, we have looked at the main trends and findings of research carried out in the region over the past 20 years. Secondly, we have reviewed the changing Latin American scene and the new challenges that emerge for adult education. Lastly, we have

briefly described some of the strategy proposals that seem to be required in order to both solve deficiencies and problems which research and experience have discovered, and to face the new challenges we have explored.

It is my contention that it is not possible to outline a research agenda in adult education for the near future without taking all three of these sources, and their interrelationships, into account. Thus, the suggestions that follow for a research agenda do not represent a linear summary of what this paper contains, but rather a personal view of the priorities for research that aims at contributing to the quality and effectiveness of adult education in a rapidly changing reality.

### **1. Quality**

Quality is the most important issue for adult education in Latin America today. Quality is a never-ending process of constant improvements in procedures and outcomes of educational endeavors.

However, research for quality is not a simple matter. Its results are hardly ever directly relevant to adult educational activities. Research for quality of adult education is a long-term task which nevertheless must be continued and strengthened.

Research for quality necessarily implies the development of basic research. We have shown that basic research on aspects related to adult education is one of the weaknesses in Latin America. But basic research, particularly related to learning processes in adults, but also introducing effective teaching with adults, should become one of the main priorities.

Quality, as we have said, implies relevance. Relevance in turn cannot be understood or studied without taking into account the plurality of cultures, specific realities, and particular needs of different groups and categories of adults in the region. Research on what makes education relevant; what is common and what is diverse in different groups and categories of adults; how to respect and strengthen the different cultures that constitute the plural societies that Latin American countries represent; these and many other issues related to relevance is another of the important priorities of research in adult education for the near future.

Related to relevance is the perspective of the learners. We have seen how the few studies that have investigated this neglected aspect in research have represented a shift in paradigms regarding the role of adult education. These studies should be continued, multiplied and carried out in larger scales, in order to obtain better insights on the constitution and the conditions for the strengthening of the demand for adult education.

Quality of learning outcomes in adult education is to a great degree determined by the educational agents. Research is needed to discover, develop, experiment, and evaluate effective ways to both train in-service adult educators and form new educators. Quality also has to do with the qualifications of other levels of professionals within the adult education system. Research should be able to give inputs to this, probably the most pressing need, for effective adult education.

Quality can only be maintained if adequate monitoring and evaluation procedures are carried out. However, as we mentioned before, we know little about evaluation in adult education, and we are not satisfied with what is available for assessing learning outcomes. Research aimed at the development of adequate evaluation methodologies and instruments that can at the same time give feedback to adult education programs and make adult education publicly accountable should become an important priority.

### **2. Contents.**

The question of quality refers mostly to the "how" of adult education. However, the "what" of adult education, mainly due to the changing scene in Latin America, poses both old and new questions for research.

Literacy of course must continue to be investigated. Emphasis on research in literacy probably has to take on new dimensions, however. What makes people in different contexts truly literate; what is the relationship between context, practice and the use of literacy; how to build literate environments; how can literacy training effectively develop higher order reasoning skills that will make self-learning possible in the future; what new "literacies" are being demanded by the environment and how to educationally respond to them, are some of the questions that should be dealt with.

Something similar can be said with respect to the learning of mathematics. Studies such as the ones we have mentioned should be strengthened and extended, and applied research on effective teaching of mathematics among adults should be initiated. Again, the relationship between the teaching of mathematics and the context of practice and use of mathematical knowledge, as well as the relationship of the teaching of mathematics with that of higher order reasoning skills, seems pertinent.

There is one big question that research has not been able to respond to and that acquires special importance in Latin America today. This is the question that refers to the relationship between adult

education and the world of work. I will not attempt to pose specific questions regarding this large issue. Suffice it to say that the demands being placed by society on adult education for training will not be able to be adequately satisfied if we do not know more about the role adult education can play in training for the job, for increased productivity, or for self-employment.

Finally, there is the question that refers to the formation of a democratic citizenry. Popular education has a large experience of forming for participation and organization. Adult education carried out by the governments, however, seems to have had little to do with this objective. The questions that we would like research to answer regarding the formation of a democratic citizenry are many and very complex. There is no question that adult education has an important role to play in the process of training for active social, economic and political participation, and in the strengthening of social organizations. It is perhaps time to bring to light the findings of popular education experience and research regarding these objectives, as well as to be able to respond to the challenges that the changing situation poses and that the other actors in adult education will have to face.

### **3. Strategies**

We have referred to the need for new strategic outlooks on adult education. Some of these strategies imply profound changes in the way adult education has operated in Latin America to date. The research community should both give inputs to the operationalization of these strategies, and carry out follow-up and evaluation studies whenever transformations do take place. Research has an important role to play in avoiding further trial- and-error approaches to adult education, as well as in insuring a dynamic conception of continuity in adult education policies and practices.

The research community should take on a more important role in the promotion of an effective, relevant, and quality adult education. It is perhaps the only sector of the population that both understands the importance of adult education and is able to articulate demands on the adult education system. Its responsibility is to take on the challenge of contributing to the political importance and the social significance of adult education in Latin America today.

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## World Perspectives in Adult Education Research

Report of the Montreal International Seminar

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The twenty participants<sup>3</sup> from different regions of the world who attended the Montreal International Seminar on Research in Adult Education have discussed, on the basis of their own analyses, the distinct trends in each region and the issues common to all regions. The purpose was less to form a global vision than to assess the emergence of new trends in the various contexts, to recognize the differences, to define the common challenges, to build a creative environment and to delineate the conditions that would allow a dialogue from different perspectives between equal actors.

In order to prepare the UNESCO International Seminar, trend analyses were made in Africa, Asia, Europe (both Western and Eastern) and North America, as well as in the Arab States and in Latin America. Then participants from each region as well as other international experts were asked beforehand, to contribute by writing papers which were used as a background to the discussions that were held in Montreal.

Five major themes have been examined:

1. diverse and shifting meanings of adult education: definitions and restructuring of the reality of organized learning,
2. the organization of research,
3. research themes and approaches,
4. the agenda for the future: trends and needs,
5. international cooperation.

### **The Diverse and Shifting Meanings of Adult Education: Definitions and Restructuring of the Reality of Organized Adult Learning**

As an area of intervention and a focus for research, adult education is a reality that is perceived and structured differently by the various actors according to their specific contexts and historical circumstances at hand. Differences between regions are numerous.

In Africa and the Arab nations, in light of the urgency of basic training needs, adult education is perceived as literacy training, first and foremost. In the subregions of Asia in which economic growth is escalating, continuing education for adults is the primary focus of adult education rather than literacy training.

In regions dominated by political violence, popular education remains underground, hidden. In other regions the urgency of resolving practical survival issues takes precedence over both theoretical and basic research. There are also cases in which underground propaganda threatens any strides made towards democracy. And there are cases in which participation in government programs reduces research to a helpful but nonvital function, that is behaviourist assessments of results without a critical analysis of objectives and implicit diagnoses.

The concept of adult education also varies according to who requests it and who proposes programs: literacy training or continuing education on the one hand and the other forms of adult education on the other. The tension between the prevailing trends in adult education constitutes an important factor to take into account in forming an accurate overview of adult education and in attempting to understand the dynamics involved in each of the different regions.

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Please refer to the end of the article for the list of participants.

An important task of research is to systematize and express the different and changing working definitions of adult education. It can be useful to examine the different patterns of dualization. In the present context of Latin America for instance, as the different educational formulas (structures) are finding a common ground in their contribution to the alleviation of poverty, the former dichotomy between formal and nonformal education is becoming less and less significant. It can also be useful to examine adult education in the very specific contexts where it is viewed only as a system and in the contexts where it is treated as an evolving reality that reflects adult life, thus making it possible for adult students to discover and take into account their own vision, areas of resistance, expectations and creativity.

Although the political economy of adult education is not the whole reality since the different educational and cultural projects of the various social actors also assume a role, it needs to be studied in each society. One of the key roles of research is precisely to understand significant changes. Thus, the transition from authoritarian regimes to more democratic forms of government in Southern Africa, Eastern Europe and Latin America transforms the context for adult education. In a new phase of national reconstruction that involves both economic transformations and a consolidation of civil society, new issues emerge:

- A new dynamic is evolving between the public structures and the independent initiatives of nongovernmental groups. Oppositional educational practices are no longer at the forefront.
- The difficulty of applying what has been learned about popular education in the implementation of a new system of adult education and the transition from small-scale experiences to nation-wide policies.
- The predominance of training requests made by economic partners - requests that pertain to the economy and, more specifically, to the formal economy.
- In Eastern European countries, the new social order and political circumstances push adult education to endorse free market principles and to abandon its fundamental positions as a field of public interest.
- Social and sociological issues are becoming of prime interest in adult education research.

In the current phase, can we define an approach that integrates the various training areas into a new national policy while maintaining its critical dimension that is a capacity for ongoing critical thought?

While adult education must be understood as a separate and distinct part of the educational scene, it cannot be analyzed in isolation, unrelated to childhood education (i.e., school) or to the cultural environment. Seen from this perspective, studies focusing on adult education can provide critical insights into broader educational and cultural issues. For example, in today's information society, literacy training is no longer analyzed as part of an epistemological framework or as a deficit related to the past but as a developmental process that builds on the strengths of the learners' subcultures and as a prerequisite for the future. This is a research task that goes far beyond the field of adult education. The same can be said about the trend in some adult education studies and practices to redefine education, not as a transfer of knowledge and skills, but as a communicative process or dialogue between people, as a sharing of genuine competencies and expertise.

The current global context raises major questions that must be addressed in this regard by researchers in the field of adult education: the urgency and priority of basic knowledge for all in a context where **poverty** constantly increases; **urbanization**, which obliges us to confront phenomena that relate to the masses; **globalization** of the economy, with the major problems of competition and exclusion; and **democratization**, the overriding aspiration to social justice and to **participation of the civil society**.

In order to be creative and to play a part in the major political stakes, one of the great challenges facing researchers in adult education consists in learning anew to **listen**, to adequately **describe** reality (which may not be evident on the surface), to **interpret** differently, and to **communicate** these new interpretations of reality more effectively.

### The Organization of Research

The organization of adult education research is changing in all the regions. In addition to the **agents** currently involved, namely government departments, universities and NGOs, new ones have come into the picture: international organizations, small private or independent businesses, research institutes

independent from universities, organizations or institutions not traditionally identified with adult education such as the armed forces, health services, telecasters, the industrial sector, and others. However, the dissemination of research findings produced by these new organizations remains extremely limited.

In the past, the often **marginal and devalued status** of adult education research has been stressed. This situation can be explained by adult education research's self-imposed isolation from the scientific disciplines, a weak definition of the fields of practice and research, as well as overly close ties with sectoral, if not sectarian practices in adult education. However, changes are occurring in certain regions. Spain for example, has initiated a major shift consisting in **opening up adult education** to an interdisciplinary approach or dialogue with the world of education, in partnership with the State and with other communities, and to encourage publication in social science journals. This openness in adult education research - which becomes possible only at a more advanced stage of research, after its goals have been identified and its specificity defined - has resulted in increased **involvement** in the scientific community and in decision-making processes, diversified financing, and a **diversification** of methods, objects of research, actors, research sites and publications. These changes are occurring however, at the risk of adult education research being **absorbed** by the more dominant economic sectors, and of losing its **status** and **value** as research which has access to funding and publication, as is the case with action research or participatory research.

In Central and Eastern Europe the change takes a different direction. Adult education research which was relatively well developed in the socialist era, finds itself in a deep crisis: decreases in the extent of research projects, cuts in government funds and the closing of significant institutions are some of the many changes. Research activities now depend on the interest of individuals and on their capacity to find funds.

As one can see in these few examples, the infrastructure of research is unequal. Moreover, the gap between North and South and between East and West is enormous considering the availability of material resources, the access to documentation and to data banks, the means of dissemination and the opportunity to influence the design and organization of new data banks. Finally, the incorporation in these data banks, of the research done in the South and the East is not certain.

Many issues regarding the organization of adult education research are emerging as significant in different regions of the world: should adult education as a research discipline be abandoned or does this area of research have an undeniable social relevance?

How should we respond to the research from other disciplines that has an impact on adult education? How should we deal with the division of labour between research and practice? How can we ensure that research centres have the autonomy and critical distance essential for high quality research?

### Research Topics and Approaches

The socio-economic and political context of a country influences the structure and development of its adult education institutions and programs and influences the choice of research topics and perspectives. Moreover, we are witnessing a certain internationalization of contexts, the globalization of economies and therefore of the major industrial cultures, as well as the growing weight of policies established by multilateral agencies (e.g., structural adjustment programs).

In such a context, do we manage to take external influences into account when determining the orientation of our research?

Partners, particularly those who are funding research, undeniably influence the choice of research topics (e.g., through emphasis on evaluations or on studies of the labour force and employment). Nevertheless, the situation is not similar everywhere; the impact of political contexts varies and is rarely absolute. The orientation of cultural industries, of new technologies also involves contradictions, and there is resistance. In short, there are gaps to be explored.

Artificial boundaries are often imposed on research in adult education, and sometimes those boundaries are self-imposed. In certain regions, there are attempts to cross epistemological and traditional institutional boundaries. Up to now, the adult education researchers have often wavered between open and closed attitudes towards researchers from other fields. The new trend is towards openness through both intra- and interdisciplinary dialogue, through exchanges between researchers in the different sectors of

education, labour and culture. In certain regions, researchers tend to participate in multidisciplinary teams, which enables them to approach certain themes differently. This nevertheless requires that the core researchers in adult education have an identity, a sense of questioning, and a capacity for dialogue regarding diverse theoretical perspectives.

There are also endeavours to involve other sectors of education in various adult education experiences and vice versa, to access general or vocational training through popular education, or to access popular education through technical training practices or surveys of the needs of working-class groups and communities.

Tensions have been observed between the growing presence of professional researchers and the desire for greater involvement on the part of practitioners. Tensions also have developed between a vertical management approach and a cooperative approach among researchers and practitioners who are encouraged to participate in critical reflection on their work. Tensions finally can be found between more global perspectives (historical, political and philosophical) or more academic perspectives and narrow objectives aimed at improving practice.

A number of changes have been noted in research topics and perspectives. Here are a few examples.

- The meaning and conditions underlying the act and ways of learning in various contexts.
  - The sociological conditions of adult learning and teaching instead of investigating only psychological conditions.
  - The transfer of concerns from delivery or intervention agents to learners and their needs.
  - A shift from taking inventories or measuring cultural deficits to recognizing differentiated knowledge.
  - Criticism and transformation of evaluative research.
  - A shift in focus from statistics on illiteracy to cultural research and to observation of various concrete communication strategies.
  - A contribution to systematizing knowledge that basic environments have created.
  - Adult education and the reinforcement of civil society.
  - The development of areas for research on gender, age or cultural discrimination.
  - The transformation of research findings into action plans.
  - The shift from traditional teaching functions to preparing conditions that are conducive to independent learning.
  - The integration of adult education into broader perspectives where childhood education, participation in later education and cultural environments are related to each other. Adult education in various countries is therefore viewed from each country's own perspectives and consequently a number of models of continuing education that have emerged.
  - Problems related to adult education, the labour market, and unemployment in economies in transition.
  - The gender factor in several of these issues.
- However, some areas are clearly underanalyzed, namely,
- the political dimensions of private life;
  - cultural, feminist and hybrid identity;
  - the content and richness of "popular knowledge";
  - cultural inequalities;
  - age discrimination;
  - the new learning needs of adults in the economies in transition;
  - alternatives to adult basic education in some countries, for example, Koranic schools;
  - the theoretical foundations of adult education;
  - the division of the roles and functions in adult education between the state, the social partners and the participants;
  - the adult learning process in different contexts; women's and the elderly's learning processes;
  - the learning strategies of the illiterate who learns mathematics;

- the motivation for research: the process of selecting research topics/problems and perspectives.

### **Agenda for the Future: Towards an International Dialogue and Significant Research**

Three major aspects were treated under the theme “trends and future needs”: the need for an international dialogue; the need for more significant research through a change in attitudes and in research methods; and finally some research topics that could have an international reach.

#### **An International Dialogue**

Certain conditions are required to initiate an international dialogue and to develop significant research in all the regions of the world. These conditions can be stated as follows.

1. Adequate access to information.
2. Skills to participate in the development and design of databases; improvements in the ways data base information is organized and critical questioning of the information that is available; criteria to establish who decides what information is available or relevant.
3. Clear rules for international recognition of research; for example, what qualifies research as "scientific", thereby giving it academic or intellectual status?
4. A network of globally connected researchers (that was referred to as the "invisible community" of researchers).
5. Dialogue among the various regions of the world; and recognition of the diversity of research contexts.

#### **Significant Research**

Pertaining to the development of more significant international research, there are needs for a change in research attitudes as well as research methods. In particular there are needs to:

1. Achieve better results: need to improve research techniques/methods.
2. Break down barriers while maintaining the distinct identity of adult education.
3. Consider ethical problems in research including the impact of imposing or integrating researchers values from other disciplines on the values held by researchers in adult education.
4. Critical evaluation of the research completed to date: need to question old assumptions, assess the results, and query whether there is a link between the results and our assumptions.
5. Critically review the approaches used in comparative research with reference to the communication and dialogue model.
6. Clarify what adult education can achieve; currently too much is expected of adult education.
7. Discover links between the development approach and the practical reality of adult education (education versus training).
8. Link more closely researchers and practitioners.
9. Assess the new developing terminology and to respond to it.

#### **Research Topics Having an International Reach**

Numerous topics could contribute significantly to the corpus of knowledge in adult education, including studies of:

1. Factors and processes that influence the quality of learning.
2. Recent global history of adult education in the various regions of the world and in various countries, from 1960 to 1990 and past Jomtien.
3. Parallel and coexisting adult education systems and relationships between them, actual and potential.

4. Cultural approaches to adult learning: indigenous knowledge, cultural styles of learning; learning outside formal settings.
5. "New partnerships" with government, business, NGOs, and others, from the point of view of equity, accessibility and supply.
6. The role of adult education in developing civil society.
7. Different ethical bases - value systems - for curriculum development in adult education.
8. The potential for using new media and information systems in adult education.
9. Past research on adult education, its uneven development and dissemination world wide.
10. Different models for capacity building within countries and regions: networks, publications, seminars, training.
11. Different theoretical frameworks of adult education and learning.

### **International Cooperation**

North/South and East/West relations in the area of research, training and information are criticized.

One of the major problems, which has been variously described, concerns the ethnocentricity of the research that is conducted with the northern and the western means and ways of doing things. This is evident everywhere in the theories and methodologies referred to, in the institutions involved, financing, codes of communication, the use of English in scientific matters, copyrights, distribution of scientific publications, criteria and "rituals" of attributing value to research.

Nevertheless, there are possibilities for change, especially in the current context of free trade as it pertains to information, and new communications practices (e.g., electronic highway, electronic mail).

### **Conditions for International Cooperation**

For international cooperation to be a constructive dialogue between actors who are equal but different, a certain number of conditions must be met.

- Adult education practices and the context must provide the starting point for the research that is being carried out rather than an artificial definition of topics.
- An open attitude must be adopted toward the research traditions of the countries involved, which must be acknowledged and respected.
- When materials and tools are suggested, room must be made for criticism with respect to the reality of the country in question.
- Recognition must be given to the aspirations of nations in the Southern Hemisphere to develop their own theories, which are based on their own daily reality.
- The competence of researchers from the Southern Hemisphere must be acknowledged, even if their ways of working do not correspond to those of researchers from the Northern Hemisphere.
- "Fashions" in research topics must be avoided, as they can create discontinuity in research activities.
- Lastly, two temptations must be avoided: first, that of creating a distance between research and practice by involving researchers not familiar with local practices (i.e., the process of decontextualization); and second, activism - i.e., making action a priority over research.

### **Recommendations**

The following recommendations are among the proposals for change in global relationships of intellectual cooperation.

- Invest in the development of infrastructures in the Southern Hemisphere and in the former socialist countries that foster exchanges of information, as well as improving access to documentation, research networks, and training, and the dissemination of research results (capacity building).
- Be receptive to the styles of researchers who value dedication, commitment, solidarity.

- Support research findings that help promote and broaden democratic debate.
- Facilitate the creation of local or regional research networks outside the universities.
- Encourage comparative research within a communicative context, and more specifically, introduce international projects within which interested countries could participate.
- Promote and disseminate research findings from the Southern Hemisphere.
- Find more effective and economical means of communicating and disseminating information.
- Foster an ongoing dialogue between governments and researchers and among researchers themselves.
- Analyze those projects where intellectual cooperation proved successful.
- Devote a seminar (at the UNESCO Institute for Education) to the theme of cooperative international research in adult education.
- Promote regional exchanges in the Southern and Eastern Hemispheres.
- Support the acquisition and use of new technology in the development of an "invisible community" of researchers.
- Examine the possibility of developing intellectual cooperation in adult education within the various UNESCO chairs.
- Change the criteria for allocation of research funds.
- Create budget items for research in UNESCO regional offices and improve the publicizing of funding sources in UNESCO publications.
- Finally, facilitate translation of scientific works into national languages.

### Conclusion

Having reviewed the major trends in current research, the participants stressed the importance of promoting more **critical research** and "counter-research" that question the assumptions of acquired knowledge, more **contextual research** that takes into account regional, cultural and historical differences, and more **cooperative research** at the international level, not in order to create a standard universal vision but rather to create an "invisible community" of researchers representing the world's different regions and perspectives, all working together in a spirit of goodwill and democratic intellectual cooperation.

The challenge at hand is a major one: to help build a shared body of knowledge in adult education, one which respects both society and the individual, which strengthens global solidarity while respecting distinct cultural identities. In other words, it is through democratic processes that we must build the body of knowledge in adult education.



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