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A perspective on the use of large scale efforts in comparative adult education research

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Introduction

This paper discusses some of the merits and challenges associated with a systemic approach to comparative adult education research which builds on the use of large scale efforts. It is partly in response to an article in last year's issue of the International Yearbook of Adult Education which discussed the future of International Comparative Adult Education Research. The article by Field, Kunzel and Schemmann (2016) problematized the purpose and value of large scale surveys that relate to the field of adult education, and even questioned whether studies such as the Survey of Adult Skills (also known as PIAAC – the Programme for the International Assessment of Adult Competencies) and the Adult Education Survey (AES) comprise comparative adult education research at all. This raises several issues related to the relationship between large scale research efforts on adult education and the comparative adult education research community, as well as more general issues in social science surrounding the framing and interpretation of empirical data for evaluative and analytical purposes.

A rationale for a systemic approach to comparative adult education research

One concern that Field, Kunzel and Schemmann (2016) discuss revolves around the notion of methodological nationalism (Beck, 1997), which at the outset is a crucial feature of the perspective on a systemic approach to comparative adult education research discussed in this article, and thus worthwhile to elaborate. Methodological nationalism refers to an approach that tends to assume congruence of social boundaries with state boundaries. It is invoked to highlight the tendency for social science to emphasize the nation state as the primary unit of analysis. Indeed, most analysis and assumptions in comparative education tend to be at the national level. This is in part because much research activity is guided by national needs and national policy, which for good or bad are often the basis for allocating resources to research. However, there is also simply the fact that all kinds of statistics tend to be collected at the national level. As pointed out by Field et al. (2016), the debate on globalization has questioned the value and wisdom of this approach because of the growing significance of transnational social phenomena (e.g. political and social movements) as well as of supra-national agents (e.g. inter-governmental agencies and multi-national corporations) which may be contributing to a hollowing out of the nation state (Dale, 2000), particularly as a relevant unit of analysis such as in comparative adult education research.

Indeed, the emergence of globalization, knowledge-based economies and neoliberalism are major forces that all nation states must contend with in these early parts of the 21st century, and there is little doubt that they contribute in many ways to a 'blurring' of nation state boundaries. These are often construed together as the rise and growing significance of global capitalism since the 1980s. Along with the critique of methodological nationalism, several scholars have argued that such forces entail an

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inevitable tendency towards convergence between nation states (Rees, 2013). While there is a significant consensus about the existence and centrality of these forces affecting all nation states, the debate on whether this will necessarily result in convergence or whether they diminish the nation state as a relevant unit of analysis is more contentious. In fact, some argue that this will lead to nation states that diverge in important ways, precisely because nation states remain a fundamental point of reference against which other structures and processes are defined and governed, whether at sub-national or supra-national, or even regional levels. Moreover, all kinds of institutional configurations remain distinct across nations, not only for historical reasons involving negotiated political settlements (Thelen, 2004), but also because of legal and administrative as well as other governance related realities that underpin the complex interconnectedness of a range of economic and social institutions. This is not to say that regional convergences (across countries) are not possible but to emphasize that nation states remain a key point of reference in enabling or constraining convergences and/or the 'blurring' of boundaries.

From this perspective, Hall and Soskice (2001) implied that the comparative advantage of nation states – that is, the key means by which a nation can stake its claim to a competitive share of the resources in a globalised knowledge based economy operating under neoliberal principles – lies precisely in the extent to which different institutional configurations are effective at coordinating problems that emerge in the social relationships underlying the market and state, market and family, capital and labour, market and civil society and so forth. Their work has led to a blossoming literature in comparative economics under the banner of *varieties of capitalism* which overlaps in significant ways with literature in comparative politics related to welfare state regimes. In the book entitled *Political Economy of Adult Learning Systems* (Desjardins, 2017), I contend that national Adult Learning Systems (ALS) are crucial not only in national economic success as implied in the varieties of capitalism literature (e.g. Hall and Soskice, 2001) but also in terms of a range of social outcomes including an equitable and just opportunity structure for diverse citizens. ALS however, are rarely seen or approached as a 'system' per se. This is because they are linked to a diverse range of stakeholders and types of opportunities, lie at the intersection of a variety of other systems including a nation's education and training system, labour market system as well as a range of other welfare state and social policy measures.

Nevertheless, many countries have experienced a growing mass of adult learning opportunities over the last thirty years as evidenced for example by PIAAC. Importantly, some countries have experienced more growth than others, often in connection with the presence of coherence in the governance and coordination among the diverse forms of adult learning, and sets of stakeholders related to each form. Nation states that feature advanced ALS have tended to treat the phenomena as an institution and as a tool to steer economic and social adjustment, development and the opportunity structure of citizens. In other countries, ALS are not seen as such and continue to garner little systematic attention or resources (Desjardins, 20017).

From this perspective, a research question that may be seen as important and relevant to comparative adult education research is as follows: What are the economic and social implications associated with different approaches to coordinating ALS? If this were accepted as a valid, relevant and researchable question it would require sustained effort to identify and understand alternative governance, provision, and financing structures that underlie adult learning opportunities in different

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nation states, as well as their associated outcomes, and to do this in a comparable manner to the extent possible. It is within the perspective that the above question is indeed worthy, that this article discusses the merits and challenges associated with the use of large scale efforts in comparative adult education research.

Conceptualising ALS

It is worthwhile to outline briefly what I refer to more precisely when I invoke the concept of Adult Learning Systems (ALS). ALS refer to the mass of organized learning opportunities available to adults along with their underlying structures and stakeholders that shape their organization and governance. Organized adult learning is defined as any opportunities undertaken by non-traditional students beyond the age of compulsory schooling. Furthermore, non-traditional students are adults who return to the formal system to complete qualifications beyond the normative age typically associated with those qualifications or tend to be over the age of 25 with few exceptions (e.g. MA or PhD up to the age of 30). ALS also include non-formal learning activities but the formal vs non-formal divide is not very useful in a cross-national setting since ALS now vary greatly in the extent to which they feature links between otherwise non-formal activities and formal qualifications, or alternatively between Adult Basic (and general) Education (ABE/AGE); Adult Higher Education (AHE); Adult Vocational Education (AVE); or Adult Liberal Education (ALE). ABE/AGE typically involve formal education undertaken by non-traditional students which correspond to ISCED 1, 2 or 3 (i.e. secondary education or lower). AHE typically involve formal education undertaken by non-traditional students which correspond to ISCED 5 or 6 (i.e. tertiary education). AVE can involve formal education undertaken by non-traditional students which correspond to ISCED 3b, 3c, 4, or 5b (i.e. vocationally oriented secondary and post-secondary education), but also non-formal education that has no links to the formal qualification system. The extent of formal vs non-formal AVE is the source of greatest variation in provision across countries. Indeed, while ABE/AGE can be specifically intended for non-traditional students, AHE and formal AVE are in many countries hardly distinguishable from the regular system where traditional and non-traditional students attain the same qualifications from the same institutions. ALE in contrast tends to be non-formal but in highly flexible systems such as in Denmark, even ALE courses may be linked to qualifications via a modular and flexible approach. The degree of openness of the formal education system to non-traditional students as well as the level of integration between ABE-AVE-AHE and ALE is a distinguishing factor in the advancedness of ALS in different countries. The *advancedness* of ALS is established in terms of systemic features of ALS and specifically defined in terms of the extent and distribution of participation, particularly among adults with socially disadvantaged characteristics (Desjardins, 2017).

Some large scale efforts that help to reveal systemic features of ALS

As already alluded to, I surmise that addressing the research question formulated above in a systematic and meaningful way relies on large scale efforts that aim to reveal systemic features of ALS. To this end, OECD countries and particularly European ones have made considerable progress in establishing the information base necessary to even begin approaching the research question as formulated above. For

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example, OECDs Thematic Review of Adult Learning Systems between 1998-2003 was a step in this direction, but the EU's Eurydice has systematized an information gathering process aiming to provide an accurate overview of national education systems including on adult learning structures. Similarly, large scale surveys such as AES and PIAAC, are ongoing and making incremental progress in making data available on the extent and distribution of adult learning in different countries. It would indeed be a pity not to view these efforts to produce such systematic information as worthwhile comparative adult education research, or at least as being strongly relevant to this kind of research, particularly in such an information poor area like adult education.

Indeed, the methodology underlying these large scale efforts are sophisticated and systematic, and are usually well elaborated in technical annexes and reports, even if few researchers refer to these in an elaborated way. Often the results are of much greater quality in terms of reliability and validity of specific measures than small scale research carried out by individual or small groups of researchers, simply because more resources are dedicated.

However, there are clear limits to these efforts as highlighted by Field et al. (2016). The attempt here is to situate these limits within the broader effort to conduct research for purposes of producing analytical insights on issues and questions that may be of relevance either to policy makers, practitioners, or subject area experts as well as scholarly researchers. For example, it is important to recognize that the *primary* research objectives of large scale efforts such as AES or PIAAC, tend to be focused on providing reliable and comparable descriptions and well defined measures, even if they might be narrow or partial. The latter often arises precisely because of the emphasis on reliability and comparability, and the feasibility of collecting data from representative samples of the general population rather than targeted subpopulations. More evaluative and analytical questions requiring interpretation of the primary data can be seen as being relegated to *secondary* status even in the first reporting of the results by the owners of the study. For example, a multivariate statistical analysis of the socio-demographic factors related to participation in adult education is a form of secondary analysis whether it is conducted by the owners of the study as part of the initial reporting or by researchers who access the microdatabase at a later stage. The only difference is that the owners of the study had in principle more control defining the primary measures and which ones to collect, but as researchers they are no more likely to effectively interpret the data for analytical purposes than are secondary researchers. Accordingly, a good strategy is to encourage as many secondary researchers as possible who are subject area experts to engage with the data that has been made available and make sense of it and draw insights from multiple perspectives. Similarly, it is easy to see that involving subject area experts and the state of the art more generally in the design of the instruments is good practice, but this does not eliminate the challenges of interpreting and making sense of the data for analytical purposes as highlighted.

In summary, there are both pros and cons to large scale efforts. However, in the adult education sector the pros are particularly important because it is an information poor area combined with highly diffuse structures associated with multiple communities of policy and practice who often lack a common conceptualisation, understanding and even vocabulary surrounding the nature and purpose of adult education. For example, unlike the regular education system, administrative data related to ALS as

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defined above do not exist. While there is administrative data in some countries, this is typically limited to narrow interpretations of what counts as adult education activity (for example, second chance opportunities to finish secondary education). I contend that this is an important reality that contributes to the handling of the adult education sector as marginal in practice, and by extension, vulnerable in terms of financing and sustained policy support that is coherent and recognizes the multiple purposes and benefits of adult education.

From this perspective, there is accordingly considerable work to be done to develop further such large scale efforts to enable fruitful analyses that would meaningfully address the research question discussed above and deemed to be worthy. Specifically, typologies must be developed further and refined to be consistent and meaningful. As mentioned, this is exceptionally challenging in an area that is so diffuse, often lacking coherence and clarity in terms of shared meaning and purpose. Nevertheless, improvements in this regard are crucial for collecting better data such as in AES or PIAAC, and for linking these to actual adult learning structures (e.g. ABE/AGE, AVE, AHE, ALE discussed above), rather than currently used concepts such as formal, non-formal and informal learning which have limited usefulness because they are too vague and rarely correspond to actual structures. Adult education researchers of all kinds have thus a critical role to play not just in formulating meaningful analysis that help to develop concepts and theories, but also in developing the information base surrounding adult learning systems. The two activities are fundamentally linked since well-defined concepts are needed to develop valid and reliable measures, and theories are crucial to provide a purpose for collecting them in a systematic way and interpreting the data. An important analogy here is the development of labour statistics which has been a concerted international effort since the Second World War involving researchers, statisticians and policy makers. Unfortunately, there is no comparable effort to point to in the area of ALS.

Field et al. (2017) draw important attention to the limitations of large scale instruments but for the reasons outlined above, I believe it is unproductive to view large scale efforts such as AES or PIAAC as something other than research or as a separate process intended as an instrument of policy that is not relevant to adult education research. Instead, we should recognize the importance of such efforts, but at the same time emphasize the importance of linking the coordination of such efforts with the adult education research community so as to increase the likelihood of making sustained improvements and more generally to open the process to enable greater methodological innovation and substantive interpretation of the data that reveal systemic features of ALS.

Example of what can be gleaned from large scale comparative data on adult education

The following provides an example of what can be gleaned from large scale comparative data that would otherwise be very difficult without such data. The analysis focuses on the incidence and growth of different types of adult education opportunities. These are systemic features at the national level that can be used as a basis for developing logical and structural forms of comparative analysis which I contend are indeed international comparative adult education research. For example, to analyse different institutional configurations of ALS at the national level and their impact on issues relevant to

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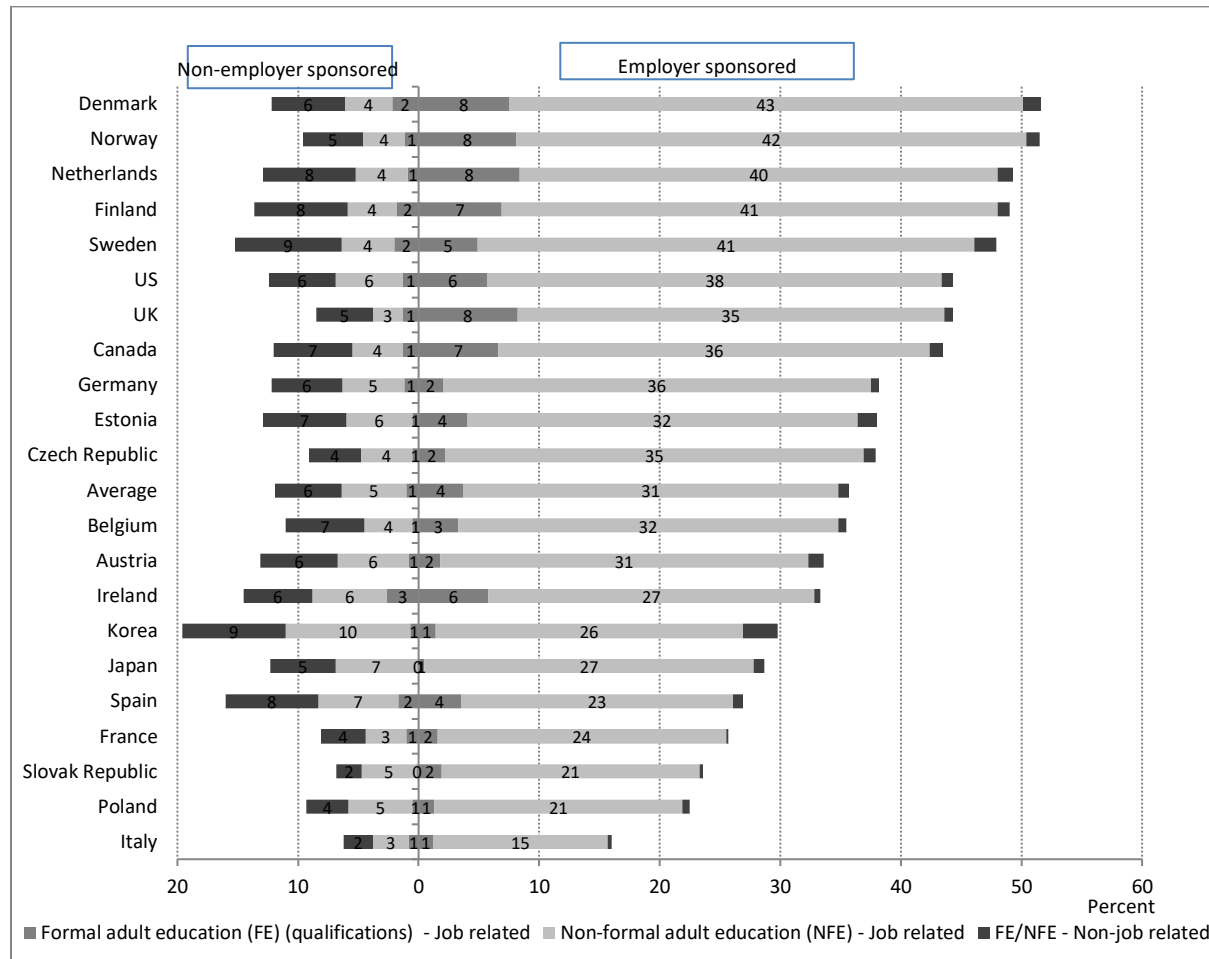
inequality and the prevalence of different kinds of structural barriers to participation in different countries, which I have attempted to do elsewhere (e.g. Desjardins, 2017).

As defined above, ALS are difficult to pinpoint empirically for a variety of reasons. Not least, the formal vs non-formal divide is of limited use since it is difficult to ascertain the extent to which non-formal opportunities may or may not lead to formal qualifications. As alluded to above, however, increasingly this is the case in many countries, especially those who have adapted the validation of prior learning and/or have steered provision to be more open and integrated with different forms of adult learning and thus flexible. As such, it is also increasingly difficult to identify adult learners from first time students attending regular school or college.

Despite these difficulties, comparative data made available by PIAAC (see OECD, 2013) are helpful and enables analyses that can capture some of the more complex nuances emerging out of ALS in different countries, but in a comparative manner. While PIAAC is primarily known as a comparative study of adult skills, it is important to emphasize that it is also a comparative study of adult learning containing data on formal and non-formal learning undertaken by adults aged 16 to 65.

Figure 1 provides an overview of the extent of participation across 21 countries that participated in PIAAC. As can be seen, adult education is now common in many advanced industrialised countries. The extent of participation in organized adult learning in the year prior to the survey (which corresponds to approximately the year 2012) was over 60% in the Nordic countries and over 50% in the UK, the US and Canada. At least two things stand out in terms of the patterns: most organized adult learning is employer-sponsored and non-formal opportunities make up a significant proportion but participation in formal education is non-trivial particularly in the countries with the highest overall activity.

Figure 1. Percent of adult aged 16-65 who participated in organized adult learning in 12-month period



Source: Own calculations based on the Survey of Adult Skills (PIAAC), 2012.

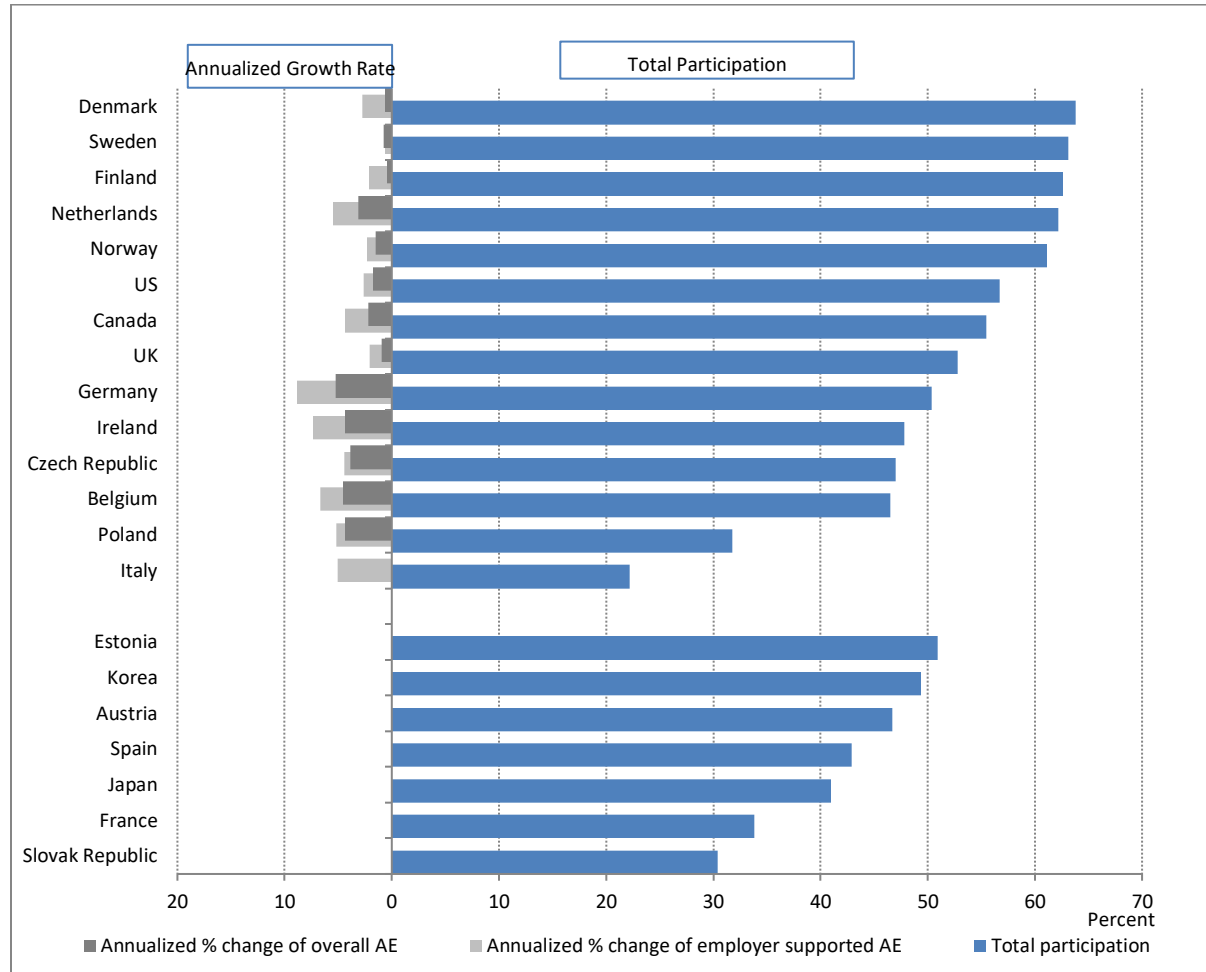
Figure 2 shows that adult education is a growing phenomenon in all the countries for which it is possible to ascertain. The Nordic countries had high and widely distributed levels of participation already in the 1990s so their annualized growth rate is lower but by no means trivial. The higher growth rates in many other countries implies that those countries are catching up to the Nordic countries in terms of the level of participation. Another key point that can be discerned from the data is that employer sponsored adult education is growing at a much faster rate than overall adult education in nearly all the countries. Since employer support tends to go to workers who already have higher levels of education and other characteristics associated with social advantage, this is a growing force impacting inequality in access to adult learning opportunities. Inequality of access for disadvantaged groups is a

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driving feature explaining overall rates (see Desjardins, Rubenson, and Milana, 2006). Unless redressed with broader social policy and government support for adult learning that is targeted to socially disadvantaged adults, inequality is likely to continue to grow. This seems to be a highly relevant development for a field such as international comparative adult education research, which would be impossible to reveal without large scale efforts such as PIAAC or AES.

Figure 2. Annualized growth rate of organized adult learning between PIAAC (2012) and IALS (1990s)



Source: Own calculations based on the Survey of Adult Skills (PIAAC), 2012; International Adult Literacy Survey, 1990s

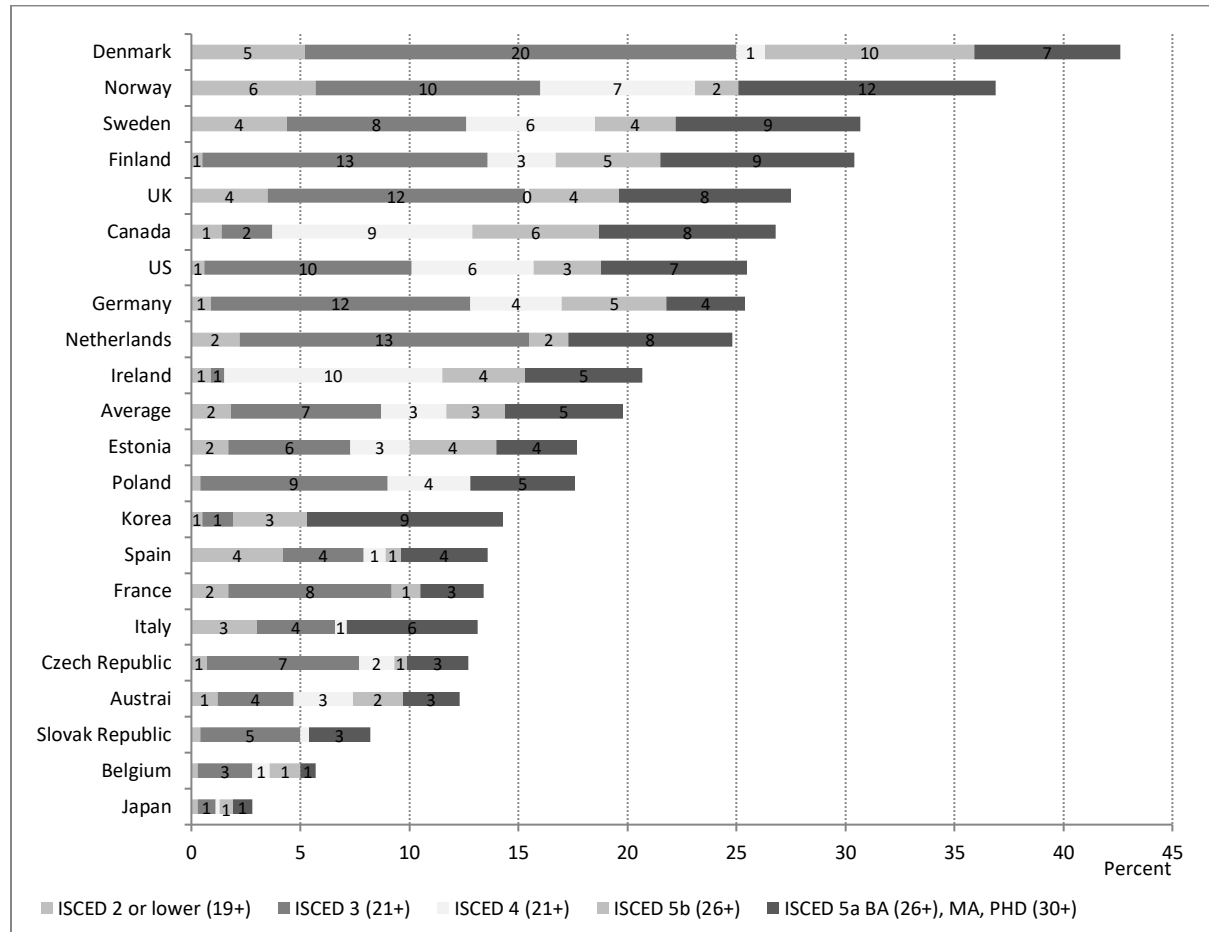
Another systemic feature revealed by PIAAC, as shown in Figure 3, is that the adaptation of the entire formal and qualification system to the needs of adults seems to be a key feature explaining overall rates of participation from a cross-national perspective. For example, results provided in the figure imply that the *openness* of higher education systems to adult students is a distinguishing factor in the *advancedness* of ALS in different countries as discussed above. It is remarkable to note that over 40% of all qualifications among the Danish adult population were attained through what can be considered the

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adult education system. A comparable figure for the other Nordic countries is over 30%, but it is also as high as 25% in Germany, the Netherlands, the UK, the US and Canada.

Figure 3. Percent of adults who attained their highest qualification beyond the normative age



Source: Own calculations based on the Survey of Adult Skills (PIAAC), 2012

Framing the interpretation of the data for evaluative and analytical purposes

The following discusses knowledge production and use in the context of social science research as well as research for policy. The purpose is to highlight the links between the two contexts, particularly in relation to large scale research efforts sponsored by governments for policy related purpose as well as how different kinds of approaches to research relate to the interpretation of such data for evaluation and analytical purposes.

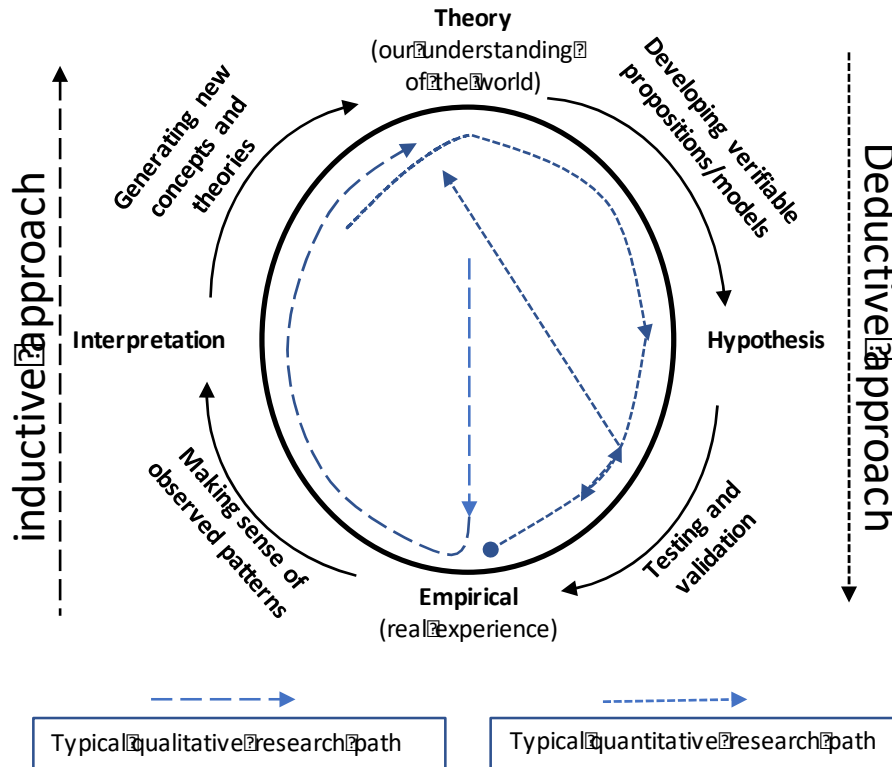
For illustrative purposes, Figure 4 puts forth a simplified but holistic view of the role and function of different parts of the research process in relation to the production of knowledge. It can be viewed as the full cycle of research and is often referred to as the 'research wheel' (e.g. Wallace, 1971).

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In brief, the top and the bottom of the wheel reflect our understanding of the world (theory) vs the reality of the world as experienced by people (empirical), respectively. The circularity reflects the process in which we come to interpret our world and validate our understanding of it, circulating between making sense of patterns that emerge out of the real world, generating concepts and theories to interpret those patterns, developing verifiable propositions and in turn validating or revising them on the basis of empirical verification and as part of an ongoing process.

Figure 4. The Research Wheel



Source: Author

Rarely, however, are all parts followed through with rigour and coherence even within the scientific community. Different researchers choose different starting points and emphasize different parts sometimes skipping some of them instead of following the full circle. This varies across disciplinary boundaries and methodological approaches to research. In particular, a quantitative vs qualitative divide has emerged since the 1970s with many researchers specializing in one or the other, and also the tendency for some disciplines as well as fields to be more strongly affiliated with a particular approach.

The divide reflects disagreements among different kinds of researchers and disciplines on the feasibility, meaning or purpose associated with the different parts as well as which parts are more important to ensure rigor in science. For example, there are widely varying perspectives on the effectiveness of quantitatively vs qualitatively oriented instruments to capture 'meaning' in a valid and reliable manner. This is unfortunate because there are pros and cons to both types of instruments and

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they are fundamentally related to one another, especially if the full cycle of research is well recognized. That is, a quality cannot fundamentally be divided from a quantity.

In reality, the debate is more complex than a quantitative vs qualitative divide. For example, it also relates to the scale of the study. Qualitative studies are typically smaller scale since they focus on capturing meaning with less 'reductionism' in the instruments. In contrast, larger scale surveys, which are often viewed as being associated with the quantitative approach, have the advantage of scale and thus potential to be representative of populations but rely on pre-defined typologies/categories which can reduce the meaning captured. Therefore, large scale surveys (should) rely on an advanced state of the art including results from smaller scale studies, often of a more qualitative nature. Ideally, qualitative research would generate not only concepts and theories but also specifically inform the development of typologies to be used in larger scale studies. As another example, the divide also relates to the contrast between inductive vs deductive approach to knowledge production, and the relation (or lack of relation) between the two such as the starting point (as highlighted in Figure 4). The quantitative method is often equated to or seen as being closely related to the deductive approach (or hypothetico deductive reasoning), whereas the qualitative method is often closely associated with inductive reasoning. Moreover, the quantitative approach may be seen to circumvent rigor in the framing of instruments and interpretation of results (requiring induction) and instead rely on technical (deductive) criteria for generating 'evidence' that support particular ideas (hypotheses). Similarly, the qualitative approach may be seen to circumvent the testing and validation of their interpretations based on well specified validation criteria (requiring deduction).

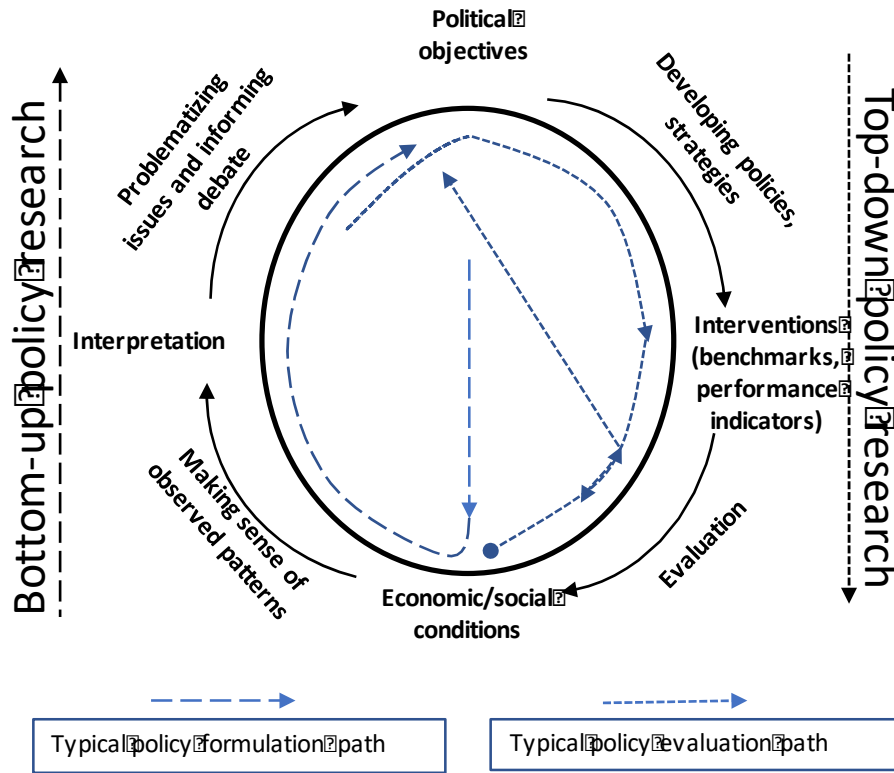
The breakdown of the research wheel as well as the tendency among the academic and policy making communities to conflate several of the distinctions drawn out in the above discussion are unfortunate. For example, the success of large scale efforts over a longer period, or more generally the development of a good information base such as in the area of adult education, require a more synthetic view of the relationship between smaller scale qualitative research and large scale surveys.

Separately, it is important to recognize that data generated out of large scale surveys can be approached using an inductive (i.e. bottom-up) or deductive (i.e. top-down) approach. This naturally affects how results are interpreted, presented and for what purpose. The reality is that large scale surveys are often intended to be relevant for different stakeholders and serve multiple purposes. In the case of PIAAC, the motivation and support for the study is related to its relevance to policy issues of interest to OECD governments. However, it is less clear to what extent it is well understood that PIAAC serves less as an instrument of policy per se in terms of 'evaluation', than in terms of an effort to document economic and social conditions in terms of a limited number of measurable cognitive skills as well as learning opportunities and behaviors so as to problematize issues and inform the policy debate on skills, education and adult learning. To illustrate this distinction, Figure 5 introduces a counterpart to the research wheel introduced in Figure 4, but the focus is on a distinction between bottom-up vs top-down policy research.

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Figure 5. Policy-Research Process



Source: Author

A bottom-up process to policy research can be seen to have been used to frame and interpret the data in the first report of the results (OECD, 2013). From this perspective, the focus appears to have been on problematization of issues which may affect policy objectives and agenda setting. This can involve the generation of new concepts and typologies and possibly new theories or ways of framing and understanding issues related to the economic and social condition of citizens. It is easy to see how this also relates to scholarly research. Larger scale studies are helpful in this regard as many of them aim to provide data that is representative of populations and thus help to provide a greater overview of the overall conditions on a set of issues.

In contrast, a top-down approach can be used to analyse large scale surveys, in at least two ways. First, statistical researchers can devise models on the basis of their understanding and test their models using the data made available (i.e. as depicted in Figure 4). If fit statistics are within specified criteria, this can be interpreted as evidence in support of the model, and in this way, contribute to new knowledge (which typically circumvents a more careful inductive approach to interpretation of results). However, it is important to note that the use of statistics does not necessarily mean that a deductive logic is followed. For example, it is entirely possible to use statistics following an inductive logic. This is the case when analysis focus on making sense of observed patterns so as to generate new concepts and theories or to problematize issues in the case of policy research as discussed above. Second, policy analysts could be seen to be following a deductive approach when the purpose of data collection and

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analysis is to evaluate specific programmes or initiatives, so as to assess performance in relation to benchmarks or other performance indicators.

From this perspective, it is ill advised to assume that results produced from large scale surveys are only used for evaluative or benchmarking purposes. For example, to my knowledge the OECD has not engaged in benchmarking exercises on the basis of PIAAC. The European Commission however, is interested in PIAAC for this purpose but this would appear to serve a secondary purpose, which reflects in part the multiple interests and possibilities associated with such a study.

Concluding remark

In Desjardins (2017), I discuss a different but related set of concerns based on a series of developments since the 1950s which have contributed to increased attention by economists to adult education issues, a field traditionally dominated by educationalists with humanistic and progressive ideals. These developments have effectively strengthened the relationship between policy (including agenda setting) and research in education and adult education, and increased the demand for economically useful research and information.

To this end, my emphasis in this article is to point out that it is not necessarily the increased attention to adult education by intergovernmental agencies, governments or policy makers that should be made problematic but rather the policy agenda of those players. In other words, a key question is *policy for what?* (e.g. progressivism, humanism, neoliberalism...). For example, the rise of neoliberalism and its impact on governance across OECD countries and the world is a more likely culprit detracting from a more progressive and humanistic agenda on adult education. The increased emphasis on introducing market based logic to the governance of public goods has tended to go hand in hand with an increased perception in policy and research circles that micro-level statistical research and experimental methods are synonymous with 'evidence', and seen as the gold standard for informing policy making so as to achieve the ideal of evidence based policy making. While results generated from these types of studies can be helpful for informing the debate they often produce a fragmented and incomplete picture; circumstances that are not helpful for making informed decisions. Given the difficulty in measuring or quantifying many of the relevant factors needed to carefully generate and interpret results relevant for policy and practice, other analytical methods are necessary. Moreover, interpretation of results from such studies need to carefully be contextualized and often depend on good qualitative accounts as well as logical and structural forms of comparisons.

As such, a well-developed and institutionalized field of comparative adult research is crucial. However, this means that it is important to foster diversity in research and perspectives that frame research and interpret results. The danger is to favour particular kinds of research and to set standards on research from a particular discipline or approach. Thus, fostering a balanced evidence base is crucial. It would thus be unproductive to emphasize research that is conducted exclusively in the academy as something separate or distinct from research conducted to enable improved governance. The two are

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strongly related. Finally, as ambitions to predicate policies on research and evidence continue to pervade, it is particularly important to foster critical awareness among knowledge producers, whether they are in scholarly academic or policy oriented circles. That is, for knowledge producers to have clear understanding of the political and social basis and implications of their research.

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