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ADULT EDUCATION AND LIFELONG LEARNING POLICIES: AN ANALYSIS OF GREECE AND PORTUGAL

ABSTRACT

This article discusses adult education policies in Greece and Portugal according to the model proposed by Lima and Guimarães (2011), which encompasses three analytical perspectives on adult learning and education. After the introduction, the methodological path followed is presented based on the document analysis of Greek and Portuguese national reports and the theoretical framework about adult education policies is discussed. A critical analysis of adult learning and education in both countries is made, based on a comparative approach. The conclusions stress the Europeanisation of adult education policies in the frame of human resources management policies as well as concerns about participation in adult education following modernisation and state control aims and conceptual elements. The findings show that both countries promote adult education as a strategy for modernisation and competitiveness in line with European Union guidelines but that there is a lack of evidence concerning democratic and emancipatory policies in adult education.

Keywords: *adult education and learning policies, comparative analysis, Greece, Portugal*

IZOBRAŽEVANJE ODRASLIH IN POLITIKE VSEŽIVLJENJSKEGA UČENJA: ANALIZA V GRČIJI IN NA PORTUGALSKEM – POVZETEK

Članek obravnava politiko izobraževanja odraslih v Grčiji in na Portugalskem. Upošteva model, ki vključuje tri analitične perspektive učenja in izobraževanja odraslih, kot ga predlagata Lima in Guimarães (2011). Uvodu sledi predstavitev metodologije, ki je bila zasnovana na analizi grškega in portugalskega nacionalnega poročila, razprava pa vključuje tudi teoretični okvir politik izobraževanja odraslih. Kritična analiza učenja in izobraževanja odraslih je bila opravljena na podlagi primerjalnega pristopa. Ugotovitve poudarjajo evropeizacijo politik izobraževanja odraslih v okviru politik upravljanja človeških virov ter zaskrbljenost zaradi ciljev posodabljanja in državnega nadzora na področju vključevanja v izobraževanje odraslih. Ugotovitve kažejo, da obe državi spodbujata izobraževanje odraslih kot strategijo modernizacije in konkurenčnosti v skladu s smernicami Evropske unije, hkrati pa nakazujejo pomanjkanje dokazov o vključenosti demokratičnih in emancipatornih politik v izobraževanje odraslih.

Gljučne besede: *politike učenja in izobraževanja odraslih, primerjalna analiza, Grčija, Portugalska*

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INTRODUCTION

Comparing adult education policies is always a complex endeavour. Adult education as a social phenomenon is based on the worldviews of its most influential policy actors. These decide on programmes based on specific agendas and interests. Although hegemonic agendas from the European Union (EU) are embedded in many neoliberal policies in several countries, various possibilities, divergent projects and alternative activities can be found locally. Differences are on many occasions the result of local reinterpretations of top-down guidelines or related to historical developments. Therefore, it is in between the articulation among hegemonic influences and specific national ones that legislation, programmes, educational aims, provisions, etc. form adult education policies.

It is also important to consider that these policies expressed in discourses and practices are the outcome of relations established among several levels of policy formation and implementation. The mega and the macro levels refer to inter/supranational as well as national guidelines and effective activities; the meso level stresses organisational arenas in which adult education policies take place; and the micro level enlightens the understanding of local actors, such as adult educators and adult learners. Even if mega and macro levels of guidance are powerful for framing education action, local organisations and individual actors can always reinterpret existing guidelines and make adult education practices different than just the outcome of top-down orientations.

Therefore, differences can be appointed in comparison due to contextual features; but the influence of inter/supranational organisation guidelines and the mimetic effect of successful policy transfers from one country to another stress similarities. Based on a theoretical proposal one needs to interpret trends in policy development with each country's specific features in mind.

In the next section, the methodological approaches utilised in this article will be presented; afterwards, a short descriptive juxtaposition of adult education policies in Greece and Portugal in recent years is made as a first step towards comparison. Data analysis based on independent national experts' reports from both countries identifies their similarities and differences, and an analytical comparison emphasises certain trends regarding policy development in both countries within the framework of the EU. The conclusion stresses certain points that emerge from the comparison.

METHODOLOGICAL APPROACHES

This article intends to discuss adult education policies in Greece and Portugal in light of three approaches to adult learning and education policies (Lima & Guimarães, 2011) debated in the next section. The main purpose is to compare recent developments in both countries, following Egetenmeyer's proposal (2012). The following question guides the writing of this article: how can similarities and differences between adult education policies implemented in recent decades in countries such as Greece and Portugal be interpreted?

The discussion in this article is based on a document analysis of Greek and Portuguese national reports (Zarifis, 2016; Guimarães, 2016), developed as part of a research project¹. The reports are secondary level data. These documents include interpretations and conclusions from the experts in charge of producing them. The analysed reports were produced as part of a network of experts funded by an EU programme. Lawn and Grek (2012) have argued that these networks of experts (defined as loosely associated actors due to the fact that experts may belong to very different institutions or even work by themselves as freelancers) act as new spaces for reinventing public discourse on education policy. These spaces allow for wider transnational governance discourses on the knowledge economy, lifelong learning, data collection and comparison. Within the production of reports like the ones analysed, comparison becomes a key element for the constant improvement of EU policy-making, a tool for governing at different levels: the inter/supra national and national, macro/state level of governing; and the meso/organisational and management level of policies with a direct influence on learners and adult educators, for instance. Therefore, as Lawn and Grek argue, “Comparison through indicators, benchmarking and ranking drives the Europeanization process forward today” (2012, p. 10), supporting innovative forms of policy-making across borders and novel forms of governance.

The reports produced by independent national experts in the area of adult education followed a similar structure². This structural similarity enabled a comparison, specifically in terms of *political priorities* and the *main conceptual elements of public policies* (Lima & Guimarães, 2011) adopted after 2000. Besides the two national reports, other sources were used, such as official data on websites, books, journal articles and PhD theses on adult education policies in Greece and Portugal in order to improve the reliability of the text and increase the objectivity of the comparison.

The next sections of the article are directed at comparing. Egetenmeyer (2012, p. 80) proposes four steps for comparison. *Descriptive juxtaposition* involves the collection of data on these countries’ adult education policies. In this step, a review of scientific articles and reports is made and presented separately for Greece and Portugal. This discussion intends to present each country’s state of adult education in an effort to provide side by side arguments and a clearer view of recent developments. The second step includes *analytical juxtaposition* when searching for common features in both countries’ adult education policies. Afterwards, *descriptive comparison* stresses the common and different features within each country. The main aim is to achieve an analysis of similarities and differences

1 This research project was called “Support for DG EMPL’s country-specific expertise in the area of adult education/skills through independent national experts located in the 28 EU Member States” according to Ecorys UK Ltd. coordination. This research was commissioned by the European Commission Directorate-General for *Employment, Social Affairs and Inclusion*.

2 This structure was agreed on by Ecorys UK Ltd. and the above-mentioned Directorate-General; it included, among others, statistical information, an overview on the adult learning system, a policy framework and governance, the latest policy reforms, priorities and implementation of policies under development, investment in adult education and the effectiveness as well as the assessment of existing policies, strengths and weaknesses of the system.

between both countries. Finally, *analytical comparison* aims to interpret the differences and common characteristics in adult education policies in Greece and Portugal according to the theoretical framework used in this article.

The choice of Greece and Portugal for comparison was due to the fact that both countries are semi-peripheral (Sousa Santos, 1993) in the frame of the EU. Additionally, both have experience of authoritarian regimes after the Second World War, established parliamentary democracies in the second half of the 20th century and became members of the EU in the late 1980s (Greece in 1981 and Portugal in 1986). Due to their historical developments, these two countries do not have a long tradition of adult education. Since the 1970s, several adult education programmes stressing the characteristics of the three educational policy approaches have been developed. However, these last 40 years have not allowed for the implementation of continuous policies and have been marked by intermittent state intervention in this area (Lima, 2005). Complementarily, both countries have been very much influenced by the lifelong learning guidelines of the EU, denoting the impact of the funding provided by the European Social Fund (ESF).

Owing to the mentioned general communalities, this article aims to describe and analyse similarities and differences in adult education policy according to the analytical approaches that were originally developed by Lima (2005) and incorporated in a joint proposal by Lima and Guimarães (2011). These approaches were also the subject of the Winter School 2018 at the University of Würzburg (Germany), which both authors of this article attended. This article is the ultimate effort to test the relevance of the theoretical framework that was discussed in one of the comparative groups at the Winter School.

THEORETICAL FRAMEWORK

The theoretical debate on adult education policies is done in this article according to the differentiation of the heuristic model of perception, understanding and interpreting adult learning and education policies covering three different theoretical/analytical perspectives (Lima & Guimarães, 2011). The first perspective includes *adult democratic and emancipatory education policies* that stress the influence of critical pedagogies. Education is lifelong, humanist, aiming at social development, promoting social justice, and cosmopolitan citizenship. A multi-faceted view of development that includes social, economic, cultural and political dimensions, and (social, political and civic) participation is associated with this understanding. A main political priority is to build a democratic society using for this purpose a fundamental social right: education. Solidarity and the common good are important values in basic education and non-formal education programmes. These values also justify implementing a broad range of initiatives to promote a civic sense and a critical, reasoned capacity based on social mobility, civil society organisations and state support (Griffin, 1999a). Educational initiatives aim at building on national cultural traditions. The individual act of learning is linked to existing public offers. The goals of learning are predominantly of a social and indirectly of an academic

nature. Learning starts in social relations, continues throughout life, in all its aspects, based on social problems and leads to educational programmes designed for adults and their perceived needs (Sanz Fernández, 2006).

The second perspective covers *adult education policies for modernisation and state control*. Education is considered a benefit in the context of social and economic modernisation. It is based on the interplay between democracy and economics. It is also an essential pillar of social policy as it involves processes that aim to ensure equal opportunity for all, particularly for those less likely to gain access to education. Education is predominantly school teaching and it is essential for training citizens (Griffin, 1999a). The rules associated with expanding opportunities for access to successful education are increasingly evident in practice; educational processes are strongly regulated (Lima & Guimarães, 2016). For this reason, adult education might be reduced to a formal and second chance; it can also stress the importance of vocational training in promoting economic growth within the schoolification of other modes of education (Olesen, 2004). The educational approach is largely reduced to reading, writing and arithmetic, to academic learning and to school-type vocational training. Therefore, education promotes receiving and mastering literacy. Seeking to discipline the adult population and educate to obey, it advances the instrumental use of reading and writing. The results of education practices illustrate the efforts at social control and the reproduction of social inequalities (Sanz Fernández, 2006).

The third perspective involves *adult education policies for human resources management*. Adult education policies still encourage redistributive principles but provide economic development benefits. Increasing competition, productivity and flexibility must be addressed by education and training systems (Griffin, 1999a, 1999b). Although education retains an important public dimension, the individual takes on new responsibilities. Among these are learning to adapt to change as an individual, being able to decide and make choices in finding the best options in a context of social and economic change. This is where education and economics are drawing closer, aimed towards learning for earning (Lima, 2012). Education and learning are considered investments. In policy discourses, frequent analogies can be found between training and financial capital. Learners are responsible and accept responsibility for their choices (Olesen, 2004). Knowledge has a utility value. In this scenario, the productivity and competitiveness of economic agents are based on their ability to process and apply knowledge effectively (Sanz Fernández, 2006).

ADULT EDUCATION POLICIES: GREECE AND PORTUGAL

Following Egetenmeyer's (2012) guidelines, a descriptive juxtaposition is made below, with each country's developments in adult education presented separately. The main adult education policies and programmes are identified and links to theoretical approaches are referred to based on a short review of literature.

Adult education policies in Greece and Portugal have a somewhat similar history due to the historical developments of the last century. Adult education has not been a central

object of public policies, except on a few occasions, in either country. Additionally, both countries have been affected by the recent crisis caused by global trends and required supranational economic and financial adjustments. These facts have caused certain similarities to occur in both countries, which will be discussed below.

GREECE

The history of education for adults in Greece is relatively short (Zarifis, 2016). The first activities in adult education arose at the end of the 19th century. Later on, in 1929, formal regulations were put in place, such as Law 4397/29, the first effort towards an adult education policy. Through this law, night schools were established with the aim of offering primary education to individuals who had exceeded the statutory age for schooling in primary schools, following modernisation and state control aims of developing basic education as a social right.

The Second World War and the Greek Civil War (1946–49) did not favour the development of an adult education system. Some resistance organisations made efforts towards the education and training of farmers. Later, the Central Committee for Combating Illiteracy (Law 3094/54) was established by the Ministry of Education in 1954. Its mission was to create night schools for the compulsory schooling of illiterate and semi-illiterate individuals according to the aims of modernisation and state control policies (Karalis & Pavlis-Korres, 2010).

The Popular Education Institution was revised in the mid-1970s and a Directorate for Adult Education was created as part of the Ministry of Education. In 1976, following the fall of the military dictatorship (1967–1974), parliamentary democracy was established (Karalis & Pavlis-Korres, 2010). After this event, the conservative government gave importance to popular education, not including, however, emancipatory and democratic aims.

Greece became a member of the European Economic Community (EEC) in 1981. Subsequently, adult education was influenced by the policies and the funding of the ESF. These influences resulted in a vast quantitative and qualitative development of adult education (Karalis & Vergidis, 2004). In the post-war dictatorship, the country was governed for the first time by a socialist party, which has included popular education as a main pillar of its programme (Karalis & Pavlis-Korres, 2010). The General Secretariat of Popular Education was founded in 1983 at the Ministry of Education. The Directorate for Adult Education was promoted to the General Secretariat for Popular Education of the Ministry of Education and jobs for permanent staff were created (Law 1320/83). There was an effort to develop democratic and emancipatory policy aims and conceptual elements, stressing a radical reorientation and objectives at central and regional levels. The new Operation Regulation for Popular Education was issued in 1985 and the Organisational Chart of the General Secretariat for Popular Training followed in 1989 (Almpanti, 2013). During the 1980s, the General Secretariat for Popular Education offered adult education training programmes related to culture citizenship education,

social economy-entrepreneurship, and for disabled people too. As a result, adult education activities increased considerably and the number of Popular Education Centres grew to 350 (Karalis & Vergidis, 2004).

The turning point in Greek adult education history happened in 1986 with certain dramatic changes. First, the ESF changed its priorities, turning to vocational training after 1989, when the First Community Support Framework started. To avoid losing funding, government policy followed ESF guidelines, positively denoting its European orientation in terms of human resources management aims. In this sense, support for popular education stopped in a conservative society and political life (Almpanti, 2013).

During the decade from 2000–2010, adult education in Greece was very much influenced by EU guidelines for lifelong learning. The introduction of Second Chance Schools in 2000 clearly contributed to this influence. This policy had an impact on many social and cultural problems, namely illiteracy, unemployment and lack of social cohesion. These adult education institutions provided formal education to adults over the age of 18 who left compulsory education without finishing it. Adults participated in educational activities or programmes with the aim of receiving a certificate. Today, there are 57 second chance schools. The curricula of these programmes are flexible, and importance is given to the acquisition of basic qualifications as well as to personal and social skills development (Zarifis, 2016). This is done in an attempt to fulfil modernisation and state control aims and develop basic education but also to promote human resources management by fostering the upskilling of the workforce and economic development.

Taking EU guidelines into consideration, lifelong learning constituted a high priority for the Greek state from 2004 to 2008. Lifelong learning was understood as a solution for illiteracy problems and a large number of literacy activities were developed. In this sense, several provisions were developed to reinforce adult education (Almpanti, 2013).

In present times, according to Karalis (2017), adult education is based on continuing vocational training and general adult education. General adult education refers to all adult education activities that aim at non-vocational dimensions, such as personal development, leisure time, parents' education, cultural education and citizenship. General adult education organisations include Centres of Vocational Training, Lifelong Learning Centres (KDVM), Parent Schools, Adult Education Centres and Second Chance Schools. Adult education policies have been financed by EU funding. Taking into account the ESF's priorities concerning the Continuing Vocational Training System, the public sector bodies responsible have taken several actions in order to qualify for EU funds (e.g. from the ESF). However, "the guidelines of the ESF's policy [...] provided only for the funding of those programmes which are related to dealing with unemployment and facilitating the adjustment of human resources to the needs of labour markets, as well as for a policy of keeping an equal distance between public and private institutions within the framework of neoliberal choices" (Karalis & Pavlis-Korres, 2010, p. 376). In this frame, the aims of human resources management have been stressed. This link can be observed, for instance,

in relation to coordinating bodies and organisations, with the Ministry of Labour and the Ministry of Education being responsible for continuing vocational training and general adult training.

Since 2010 the country has been suffering the most severe economic crisis in its history with dramatic consequences in both social and economic life. For example, salaries were reduced dramatically, and unemployment rates rose from 7.7% in 2008 to 27.3% in 2013 (Karalis, 2017). As a result, low participation rates in adult education (3.3% in 2015 based on data from Eurostat³) are still observed, and consequently, raising participation rates has become a major policy concern (Zarifis, 2016). However, provisions under development follow modernisation and state control policies but mostly human resources management aims, devaluing democratic and emancipatory programmes that could improve motivation, lifelong education and the learning interest of Greek adults. In this sense, “the need for shifting the paradigm” (Zarifis & Gravani, 2014, p. 302) seems to be a relevant argument.

PORTUGAL

Like Greece, Portugal does not have a long tradition of adult education policies. The most relevant developments started in the 1970s. The popular mobilisation that occurred after the democratic revolution on 25th April 1974 took many forms of expression, stressing the dimensions of the adult democratic and emancipatory education policies approach (Lima, 2005; Lima & Guimarães, 2018). In terms of adult education, it was linked to a rationale of intervention typical of popular education. It was based on participatory dynamics and socio-educational activism that has spawned a myriad of local self-organisation initiatives developed by civil society organisations endowed with considerable independence and often of remarkable creativity (Melo & Benavente, 1976).

The most striking educational aspects are often associated with political and social demands, cultural projects, local improvements and community development, mostly from the bottom (of the community) up (to the state and the administration), from a decentralised and autonomous political and organisational perspective. From the variety of collective actors that then emerged, we can single out popular associations, long suspended during the previous authoritarian regime, and the creation of new associations and more-or-less informal groups. Some of these groups were later formalised as popular associations of local development. Among the initiatives that associations and popular movements focused on, especially in the second half of the 1970s, were literacy programmes, cultural and socio-educational work, and basic education initiatives (Lima, 2005).

1986 saw the adoption of the Basic Law for the Education System (still in force) and Portugal's entry into the EEC. The biggest challenges for this ‘new’ country were to modernise its economy and infrastructure, to make public and private management effective and

3 Data accessed on 27th September 2018 at: https://ec.europa.eu/eurostat/tgm/table.do?tab=table&init=1&language=en&pcode=sdg_04_60&plugin=1

efficient, and increase the economy's productivity and competitiveness. Adult education was not seen as a strategic variable in these challenges (Lima, 2005). The Basic Law highlighted second chance learning and school inspired vocational training, even though the latter has not been regarded as a subsector of adult education. This legislation stressed the adult education policies that support the modernisation and state control approach (Lima & Guimarães, 2011; 2018).

Second chance school education and vocational training were thus the cornerstones of educational policies between the mid-1980s and mid-1990s. Mostly developed in mainstream schools with evening classes, second chance education was largely attended by young people who had dropped out of regular day school. With its own rules and making use of a significant countrywide state school system already up and running, second chance education exposed complex dropping-out problems, issues of coordination with the popular education and local associations model; the model was eventually overwhelmed by the centralised paradigm of formal education, school certification of levels formally required by basic and secondary education (ordinary day school) and by the dictates of continuing studies imposed on regular students (Lima & Guimarães, 2011). Faced with the strong schooling and formalisation of adult education, vocational training was regarded as an independent but parallel route, attracting increasing funding, largely from the EU, but revealing structural, political and educational incompatibilities with the popular education and basic education model which, moreover, it always ignored (Lima, 2005).

Up until the late 1990s, formal second chance education was emphasised in adult education policy. It was supported by the idea that adults needed to attain a compulsory level of education (9 years at that time). It was a basic step towards becoming democratic and participative citizens in a free society that fosters equality. Initiatives were developed in education, leading to the decrease in school abandonment and dropout rates, and the general increase of education levels. However, these were not enough to overcome the significant educational differences between Portugal and other European countries (Portugal, 2015). Since the late 1990s, adult education policies have become aligned with EU's lifelong learning guidelines in line with the adult education policies for human resources management approach. In policy discourse, the link between education/training and economic development became clearer. Two main certified forms of provision were established: adult education and training courses, which combined an educational component with a vocational training one, in some courses including training in a specific work context; and recognition of prior learning, fostering the valuing of experience and learning developed throughout life with an economic and social impact (Guimarães, 2011).

The New Opportunities programme, developed from 2005 to 2011, included these two offers. During this period, an important increase in access of adult learners was observed, specifically from those learners involved in the recognition of prior learning. More than one million enrolled in this provision. Around 600,000 got an education diploma and one third of these also got a professional qualification for attending adult education and training courses. The funding mostly came from the ESF (75%). Learners attended local adult

education centres all over the country that hired more than 10,000 adult educators; furthermore, many learners were involved in adult education and training courses (Portugal, 2011). Especially after 2011, Portugal experienced a deep economic and social crisis as a result of the global crisis. It has also been affected by the EU, the European Central Bank and the International Monetary Fund structural adjustment policies. Additionally, the EU structural programmes were implemented in a context of economic and social constraints of unemployment, difficult living conditions, low expectations of the population about the future, and instability in social and political consensus and in the social pact (Mateus, 2015). After 2012 (up until mid-2016), the adult education policy was suspended by the elected Government: the New Opportunities programme was abandoned, the existing adult education centres were shut down and adult educators fired, severe financial cuts were made and there was a decrease in adult learners enrolled and certified by existing forms of adult education provision, such as basic and secondary education. Since 2014, the economy has been recovering slowly based on sectors such as tourism and industry (transport equipment, electric, electronic and computing equipment, pharmacy and chemical products and products from the extractive industry)⁴. A new adult education programme was announced in August 2016, called the Qualify Programme. This programme is still based on the two above-mentioned forms of provision, adult education and training courses, and the recognition of prior learning. A new trend in adult education policies might be emerging, and while its impact is still unclear, human resources management principles seem to be reinforced (Lima & Guimarães, 2018).

DATA DISCUSSION 1: SIMILARITIES BETWEEN GREECE AND PORTUGAL

Europeanisation of adult education policies, lifelong learning aims and the importance of ESF funding – following human resources management principles

In 1990s Greece, lifelong learning arose as a fundamental strategy in the EU's education and training policies. With the aim to promote the Europeanisation of education at an international level, the EU assumed a central role in the field of lifelong learning (Almpanti, 2013). Since then, this influence has still remained clear. As stated in the Greek report, Law 3879/2010 on the "Development of Lifelong Learning and other provisions", which is still in force, intends

to establish an integrated legal framework for more efficient co-ordination and systemisation of the Lifelong Education and Training actions and bodies. [...] All policy priorities today are set in the law 3879/2010 which defines lifelong learning as an activity spanning people's life and aimed at both the acquisition and the improvement of general and scientific knowledge, skills and competencies as well as personal development and employability (Zarifis, 2016, p. 8).

⁴ Data accessed on 28th October 2018 at <https://www.pordata.pt/Portugal/Grau+de+exposiçao+ao+comercio+internacional+total+e+por+produto-2276>

In this report, it is also added that one of the main strengths of the adult education system is the National Lifelong Learning Strategy:

The strategy is prescribed in detail in the seminal law (Law Nr. 3879/2010) on Lifelong Learning that was voted in by the Greek Parliament in September 2010. This law sets the basis for the planning and implementation of a holistic strategy on lifelong learning and for the creation of the National Network of Lifelong Learning (NNLL), which encompasses all governing bodies and service providers operating under the auspices of different ministries (Zarifis, 2016, p. 17)

During the 2000s, the New Opportunities programme was implemented in Portugal, supported by EU structural funds. The Portuguese report states:

The European Union structural funding programmes, such as the national strategic reference framework (2007–2013) (in Portuguese *Quadro de Referência Estratégica Nacional – QREN*) had their objectives defined before the crisis of 2008 in the context of an economic growth cycle. The increasing link of investment trends and international trade had a significant influence on the New Opportunities programme (in Portuguese *Iniciativa Novas Oportunidades*) developed from 2005 to 2011 (Guimarães, 2016, p. 7).

Following human resources management aims and conceptual elements, the strengths of linking education/training and economic development are also added in this report:

The national strategic reference frameworks and adult education national policies expressed an optimistic understanding of the referred link and reinforced the urgent need of increasing the Portuguese economic competitiveness through the raise of workers' skills (Guimarães, 2016, p. 11).

Concerning the influence of the EU, funding arises as a significant tool. As stated in the Greek report, “from 2000 onwards, with the introduction of some new policies and initiatives [...], many of them were adopted under the threat of a loss of financial support from the European Union” (Zarifis, 2016, p. 6). The same report adds that policy issues and challenges in adult education in Greece intend to improve the

correlation between education & training and the labour market. Despite the efforts and some relevant actions at policy level by the Council of Lifelong Learning and of Linking with Employment, the goal to increase the employment rate of those aged 20–64 to 70% cannot be realised without rebooting the economy within a strategic framework that builds a permanent link between adult education and training with the labour market (Zarifis, 2016, p. 24).

In fact, after entering the EEC, adult education in Greece was influenced by policies and funding rules set by the ESF (Almpanti, 2013; Karalis & Pavlis-Korres, 2010). During the period of 1994–1999, Greek adult education “coincided completely with the acceptance and implementation of ESF guidelines, in order to ensure funding for ongoing training from European Funds” (Zarifis, 2016, p. 6). Even recently, this influence is evident and financing coming from structural funds (ESF) resulted in the expansion of many activities with a clear stress on adult education programmes directed at human management resources and fulfilling labour market needs.

The same influence can be noticed in the Portuguese report. It states that the EU programmes “allocated funding to adult education provision and vocational training” (Guimarães, 2016, p. 3). Additionally, it mentions that “the planned financial support from the European Union for the investment priority most directly targeting adult education [...] aims at increasing qualification and the retraining of human resources, through the improvement of competences, in specific those relevant for work and the labour market, and lifelong learning” (Guimarães, 2016, p. 17).

In sum, the impact of the EU is visible in the implementation of adult education programmes that are strategies of lifelong learning including human resources management aims in both countries.

Widening access and participation while fostering certification – following modernisation and state control principles

In the Greek report, it is stated that the “Achievement of European targets becomes even more difficult because Greece has only 3.3% share of 25–64 year olds participating in lifelong learning, one of the lowest participation rates in the EU” (Zarifis, 2016, p. 19). Therefore, the report stresses that

one key priority relates to the low percentage of adults participating in education. *Raising participation rates* therefore is a major policy concern. Greece has one of the lowest participation rates in lifelong learning (3.3% in 2015 based on data from Eurostat) and this essentially calls for policy incentives that will both motivate and allow adults of all ages and backgrounds to participate, but at the same time requires outreach and guidance policies that will target social groups that are more vulnerable and have limited or no access to lifelong learning provision (Zarifis, 2016, p. 10).

The same concern can be found in the Portuguese report. For instance, critiques were made of the adult education policy suspension in 2012 that had the impact of lowering participation after some years of a policy that allowed the increasing participation of adults in adult education provision. Therefore,

from 2011 to 2015 there was a decrease in the participation of adults in lifelong learning. With low-qualified adults this consistent decrease was evident

between 2011 and 2015. This decrease was due to the suspension of the adult education policy in 2011, and to the end of the national strategic reference framework supported by EU funding programmes (2007–2013). These programmes allocated funding to adult education provision and vocational training. It was also due to structural adjustment policies that involved severe cuts in State expenditure, reducing the scope, resources, capacity and beneficiaries of public policies (Guimarães, 2016, p. 3).

In sum, due to previous historical developments, both countries share policy aims on widening access and participation as well as conceptual elements linked to fostering the certification of adults following modernisation and state control principles.

DATA DISCUSSION 2: DIFFERENCES BETWEEN GREECE AND PORTUGAL

Policy considering all forms of adult education vs policy stressing some forms of provision

Both reports under analysis present more similarities than differences, as already mentioned, mainly as a result of EU policies and funds. However, some differences may be found, namely that the Greek report emphasises the lifelong learning policy covering all forms of adult education. Following modernisation and social control aims, the Greek report mentions that “Greece today has developed a subtle yet active lifelong learning policy framework that largely covers all forms of adult education” (Zarifis, 2016, p. 6). Based on this, conceptual elements including second chance education as well as non-formal education are part of the programme

‘General Adult Education’ which includes all organised learning activities (formal and non-formal) that are addressed to adults and seek to enrich knowledge, to develop and improve abilities and skills (including literacy, numeracy and basic skills in ICT), to grow an individual’s personality and active citizenship, is provided by a large number of state subsidised educational institutions. Functional literacy programmes are only addressed to those adults who did not complete compulsory education (Zarifis, 2016, p. 6).

In contrast, the Portuguese report stresses certain forms of provision included in the existing adult education policy, such as the recognition of prior learning, adult education and training courses, and second chance education, leaving many non-formal adult education programmes led by public, private and civil society organisations outside of policy borders. In fact, the stress on the link between education/training and economic development that the Portuguese policy seems to make reinforces the human resources management aims (Guimarães, 2016).

Curiously, this link is weakened by the lack of social recognition adult education policy has among micro, small and medium size enterprise employers. Following this reasoning,

the Portuguese report states that “the large majority of enterprises in Portugal are micro, small or medium sized, in which employers do not value education and training and in which many workers are low educated and trained” (Guimarães, 2016, p. 23). Following a different situation, the Greek report shows a stronger emphasis on a social pact among different policy actors as employers’ investment in learning “is largely achieved through collaborations and partnerships between the Employment Agency (OAED) and private sector stakeholders, employers, social partners and other stakeholders in the fight against unemployment” (Zarifis, 2016, p.13).

A final note should be reserved for participation rates in Greece and Portugal (see footnote 3). In Portugal this rate was 9.7% in 2015, considerably higher than the Greek rate of 3.3%, according to the Eurostat data available. This is a relevant difference that might be explained by the stress put in Portugal’s political agenda on the development of adult education and training policy since the 2000s (Guimarães, 2016). In Greece the recent political situation discussed in the report does not seem to have allowed for similar stress on an adult education policy which led the expert in charge of writing the report to this weakness in the adult education policy (Zarifis, 2016).

In sum, the main differences in both reports relate to the stress given to a policy embracing a range of educational activities, following modernisation, state control and humanistic aims, sharing different conceptual elements referred to in the Greek report, and to a smaller number of conceptual elements in provision in Portugal. These differences are related to historical developments in Greece and to the emphasis put on formal and non-formal adult education, while in Portugal intermittent policies have allowed the abandonment of emancipatory and democratic aims and conceptual elements observed in the 1970s in favour of human resources management, modernisation and state control principles.

CONCLUSION

In this article we intended to analyse similarities and differences between adult education policies in Greece and Portugal, and to discuss adult education policies in these two countries while taking into account a theoretical model covering three analytical perspectives of adult learning and education policies developed by Lima and Guimarães (2011): i. adult democratic and emancipatory education policies; ii. adult education policies for modernisation and state control; iii. adult education policies for human resources management.

Concerning the human resources management approach, adult education policies were not the central issues of these two countries’ political agendas for many years, and the recent stress put on adult education has very much been influenced by the EU; the two countries promote adult education as a strategy for competitiveness and not as a policy directed at emancipatory and democratic aims and conceptual elements. Based on our analysis, it is important for these countries to promote the acquisition and improvement of general and specific knowledge, skills and competencies in order to foster employability rather than the motivation for education, critical thinking, personal development and civic

participation of adults. In Greece, lifelong learning guidelines from the EU have been the basis for a fundamental strategy in national policies. Following a similar path, adult education programmes in Portugal aim to increase the qualifications of human resources through the improvement of competencies for the labour market (Guimarães, 2016). In this sense, education and learning are seen as good investments for the future with the purpose of learning for earning (Lima, 2012).

Generally speaking, the analysis of the Greek and Portuguese reports shows that both countries have more similarities than differences due, among others, to the influence of EU guidelines and funding. Looking at the three analytical perspectives of adult learning and education, particularly modernisation and state control, it is important to stress that Greece promotes the formal certification and qualification of people by attracting learners to learning, for example, with Second Chance Schools (SDE). In Portugal, even based on the implementation of forms of provision such as the recognition of prior learning that emphasise informal learning, certification of compulsory education is also a significant policy aim, denoting the importance of achieving a minimum basic educational level for all Portuguese people. Although adult learning and education strategies have been implemented in both, they have not been enough to significantly raise participation rates in formal, non-formal and informal learning activities, as shown by Eurostat statistics⁵.

When considering the emancipatory and democratic approach, there is a lack of evidence. Books and articles read on Greece's and Portugal's historical developments in adult education show that emancipatory and democratic political priorities and conceptual guidelines were part of programmes implemented before Greece and Portugal became members of the EU. Therefore, two arguments may be presented for this lack of evidence. The first one concerns the influence of top-down/mega lifelong learning guidelines in national contexts, a solution this article has tried to stress. Although Zarifis (2016) makes claims about the importance of adult education policies based on a wide understanding of lifelong learning that would face key challenges observed in Greece in present times, both reports express the need for "shifting the paradigm" and of a "new ecology of lifelong learning in Europe" (Zarifis & Gravani, 2014, p. 302) in an innovative national policy framework centred on the learner and emancipatory in nature.

Additionally, the analysis carried out in this article mainly stresses the importance of mega trends, such as the one resulting from the influence of EU guidelines for lifelong learning at the macro level, i.e. national policies. Europeanisation (Almpanti, 2013) is a relevant feature in both countries, especially due to the use of the ESF. Differences relate mainly to macro and meso characteristics, especially the fact that in Greece adult education policy includes a range of educational activities, formal and non-formal, while in Portugal the policy is centred on formal forms of provision.

⁵ As stated by Eurostat at: https://ec.europa.eu/eurostat/statistics-explained/index.php/Adult_learning_statistics, data accessed on 28/10/2018.

When considering the few differences identified in both reports, we believe it would be important to also collect data by using data collection techniques different than document analysis. By choosing data collection techniques centred on local organisations providing adult education programmes and on adult learners and adult educators, for instance, the meso and the micro levels could be emphasised in our analysis. Therefore, a final note has to be devoted to the methodological approaches and choices made. This article is based on the content analysis of two reports complemented by a short review of the literature. In spite of the relevance of document analysis, this data collection technique hides the limitations inherent in an analysis based on written texts. Within these options, similarities were stressed. However, a clearer view of recent developments in adult learning and education policies in both countries would probably require the use of other data collection techniques, such as observation (i.e. case studies, content analysis of the offer and programmes for adult education) or interviews. These other data collection techniques could eventually enlighten a differentiated reception of EU guidelines and differences in policy development patterns in each country.

Another argument presented to explain the lack of evidence on emancipatory and democratic principles might be linked to the structure of reports such as the ones discussed in this article, which are produced in the frame of comparison and networks of experts. Lawn and Grek (2012, p. 9) refer to the importance of these networks' discourses in the production, distribution and circulation of ideas in order to influence the decision-making process in the EU. Within this frame, *monotopia*, one single/one dimensional discourse, has been emphasised by the adoption of one single structure that experts from all EU countries have to follow in producing reports, while *heterotopia*, referring to different scales and sites, fluid and changing trends, mediated by barriers, regional histories and national projects, has been set aside when writing these documents. Therefore, it might be that emancipatory and democratic principles would come to light in such reports if national and regional differences (at macro and meso levels) could be included in the experts' analyses. If so, further research would be needed to develop an article that is far enough removed from the aims established for this one.

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