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TYPOLOGISATION IN SOCIAL SCIENCES AND COMPARISONS WITH POLICY IMPLICATIONS

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Kontaktandmed

Rahvusvaheliste sotsiaaluuringute keskus
Uus-Sadama 5, 10120 Tallinn
Koduleht: http://www.tlu.ee/rasi
Telefon: 619 9860
E-post: rasi@tlu.ee

RASI sotsiaalmeedias

Facebook https://www.facebook.com/TLURASI/

This working paper is dedicated to the memory of Professor Ellu Saar, in honour of her 70th birthday.

Abstract

From the viewpoint of a previous collaborator, this paper revisits works of the Institute of International Social Studies at the University of Tallinn to take stock of comparative research, notably theoretical strands proposing typologies of countries and their underlying social systems. This is done by leaning on contributions from comparative politics and sociology, educational sciences, as well as theories of social stratification, primarily applied to adult education and lifelong learning.

The paper centres on typologies based on characteristics of national structures and institutions. We put emphasis on transition societies in the prolongation of the Institute's distinction between post-Soviet and post-socialist countries. This and other distinctions prepared for methodologies that notably facilitated exchanges between countries belonging to the same typology, although each type of a typology may unfold in several variants; thus depicting a fragmented picture of mixed or hybrid national systems. Yet such a careful elaboration of typologies can identify experiences with high potential for policy learning. In this way, useful insight can be gained by making meaningful comparisons, rather than conducting mutual policy learning that mainly transfers experiences from entirely different contexts.

Key words

Comparative social research; country typologies; social systems; adult education; mutual policy learning; EU enlargement

Introduction

The paper first looks at country characteristics that underpin comparative analyses in social sciences, notably the design of national labour market, education and social systems. These characteristics may serve as building blocks in the construction of typologies, enlightened by theoretical strands from which also the Institute has sought inspiration.

Particularly three such strands have nurtured typologies able to shed light on adult education and lifelong learning, a societal field much investigated by the Institute of International Social Studies at the University of Tallinn (hereafter abbreviated into the Institute). Notably, comparisons of living and learning conditions delve into how disadvantaged adult learners are engaged in lifelong learning. Studying different groups of learners appears as a logical consequence of the Institute's investigations of social stratification patterns, for example when reasons for not participating in adult learning are scrutinised.

The paper then looks at the specific situation of post-Soviet countries, notably the Baltics among which Estonia has a large contingent of Russian-speaking second and third-generation citizens. Among the typologisations suggested by the Institute, the distinction between post-Soviet and post-socialist countries is still relevant for analysing how current EU policies toward transition states can accommodate national specificities; much as the Institute once documented when comparing adult-education policy before and after the Soviet era. Accordingly, the empirical part of the paper compares the Institute's conceptualisation of post-socialist transitions to current initiatives that support transition states in the field of adult education and lifelong learning. This comparison is guided by the question: Recognising that EU adult-learning strategies are mediated by national institutional architectures, how can typologies be used to improve cross-border policy learning aimed at adult learners?

A tentative answer to this question ultimately lays the foundation for understanding what can realistically be expected from typologisations of practices in adult education and lifelong learning.

Country comparisons and typologies

Since at least 1994 when the name 'Institute of International Social Studies' was adopted, this entity at the University of Tallinn, along with fellow researchers, have identified clusters of countries based on factors such as care provision and financing, stages of economic development, labour market characteristics, and research investments. Estonia has been grouped together with Central and Eastern European (CEE) countries in terms of employment structure (see e.g. Sepp et al., 2009; Azhinov & Lapshova, 2023). Furthermore, the Estonian civil society has been investigated by looking at youth engagement, such as a comparative study of Estonia and the Czech Republic that identified four types of young citizens based on their political and civic activities, thus revealing differences in political socialisation between the two countries (Beilmann et al., 2018).

From the angle of the fairly recent EU Member States, Szelenyi and Wilk (2010) identified two broad trajectories of transformation, of which one comprised East Central Europe, including the Baltics, all with rather similar health care, pension, and higher education systems. The authors concluded that inconsistency between economic and welfare institutions (stemming from a clash

between neo-liberal institutions and old socialist distributive system) could not be maintained in the long term. Some new forms of complementarity between these institutions therefore had to emerge in these countries.

When looking into possible typologies for cross-country comparisons, the Institute partly built on works by David Stark who developed a typology of privatisation strategies in East Central Europe (cf. Stark, 1992). He later underlined the importance of looking at post-socialist transformations as dynamics in an attempt to explain "a distinctively East European variant of capitalism" (Stark & Bruszt, 2001). Particularly for Estonia, Eerma and Sepp (2009) pointed at a shock-therapy approach to economic reforms. The outcomes of Estonia's transition have been compared to Lithuania's more gradual approach, highlighting differences in social, economic, and cultural backgrounds (Pilia, 2017).

Edwin Amenta (2003) identified fruitful paths for historical and comparative research, i.a. the concept of social policy regimes, such as developed in Esping-Andersen's types of welfare states. Basically, comparative social research engenders characteristics that could be used for country typologies according to what researchers actually focus on. The typologies discussed in the present article may put a scientific inquiry into a societal context. They can also be used for summarising investigations of societal phenomena, for example in the field of adult education or lifelong learning. Prior to this, hypotheses about typologies can accrue from analyses at a macro level, e.g. classifications of welfare systems.

The Institute soon expanded classifications of welfare systems by incorporating additional theories, particularly those that help illuminate educational factors. This expansion could explain the role of education in social policy, and lifelong learning in a broad sense. Accordingly, the Institute in 2013 winded up an EU research project demonstrating that certain types of adult learning systems were embedded in institutional frameworks that go beyond national labour markets and welfare systems, cf. Saar et al. (2013a). Research on living and learning opportunities in welfare systems gradually led to more fine-tuned typologies when transition societies were closer analysed, i.a. distinguishing countries previously grouped together, such as the post-socialist and post-Soviet countries. Saar et al. (2023b) could therefore in 2023 summarise this distinction as follows:

> "During the socialist period, the policies of lifelong learning were oriented in two directions: vocational education and Communist rearing. In most CEE countries there was comprehensive system of advanced training and skills improvement with inclusive "second-chance" policies. The collapse of the socialist regime brought about the disruption of the state monopoly over education, resulting in the rise of private institutions and market elements in adult education, and in the shift toward regarding adult education as a tool designed to serve labour market needs, beyond providing a "second chance." This changed the role of lifelong learning from the 1990s onward, and in several post-socialist countries, but especially post-Soviet ones, the national policies still lack the holistic understanding of lifelong learning as an institution that would enable meeting social and cultural challenges beyond those related to labour market" (ibid)."

One guiding principle for investigations at the Institute seems to have been the necessity of multi-level analyses to capture interactions between systems within a societal formation, especially to shed light on sub-systems and policy fields. Some of the ensuing institutional configurations in the field of adult learning are discussed by Saar et al. (2013c). The authors pinpointed that a diverse range of institutions and configurations, from education and training systems and labour market systems to welfare systems and beyond, is relevant for adult learning. At this point, the

distinction between adult education (or learning) and lifelong learning imposes itself. Lifelong learning includes formal, non-formal, and informal learning across all ages and stages of life. The European Union emphasises that lifelong learning is essential for personal fulfilment, employability, social inclusion, and active citizenship. The EU definition specifies that adult education aims to increase employment prospects, personal and professional development, alongside social cohesion. Furthermore, adult learning is presented as a vital part of the EU's lifelong learning policy, focusing on upskilling and reskilling adults to meet the demands of a changing labour market (cf. the European Commission webpage on 'Adult learning initiatives').

The Institute has been concerned about a rather stumbling dialectic between labour market and civil society considerations when lifelong learning policies are put into practice. Works produced at the Institute therefore commented on the state of the civil society in Estonia, and how this country was able to support a lifelong learning discourse. A recurring diagnosis was that education was primarily seen from an instrumentalist and labour-market-driven perspective, cf. Saar et al. (2013b). This points to a principal question in cross-country analyses: whether multi-country policy measures, often derived from or inspired by research results to improve education and other sectors, could foster convergence between the national systems under scrutiny. A cross-country study carried out by Han et al. (2013) revealed for example that citizenship education did not translate into corresponding attitudes among young people in Europe. Furthermore, the authors found very limited cross-national convergence towards a set of policies and curricula emphasising individualism, human rights, democracy and active citizenship (see also Hoskins and Ridley (2013).

The next chapter looks further into how abovementioned country characteristics, particularly the design of national labour market, education and social systems, may serve as building blocks in the construction of typologies. This will be done by presenting some theoretical strands that have inspired typologisations of country characteristics.

Theoretical strands underpinning comparative analyses in social sciences

We present three theoretical strands apt to underpin comparative analyses from which also the Institute has sought inspiration. These strands are not mutually exclusive, which underlines that they are not consolidated schools of thought in a strict sense. The choice of these strands can be criticised for being selective, and it only renders justice to a few theoretical sources with which the Institute communicated and sought inspiration from. A comprehensive account of all relevant theoretical strands would require a systematic analysis of scientific references cited in its publications since 1994; a task that would have merited a paper of its own.

SOCIAL STRATIFICATION

Studies of social stratification i.a. look at intergenerational and intragenerational patterns like poverty, income dynamics and health conditions. Among the contributions from sociologists count Peter M. Blau and Otis Dudley Duncan (cf. the Blau-Duncan model, 1967). They both analysed how social stratification through occupational status is only scarcely modified from generation to generation, particularly when measured by educational achievement.

With much of the same subtility towards measurement as later was expressed in Duncan (1984), the Institute has used longitudinal survey data to measure and analyse social change, while distinguishing between permanent and transitory characteristics. Social stratification was, indeed, much of a starting point for quantitative cross-national investigations at the Institute. In

this regard, Helemäe and Saar (1995) examined how the shift from a totalitarian regime to privatisation in the early 1990s led to the emergence of new social strata and a restructuring of social inequality. The authors underlined that stratification under totalitarian, socialist regimes differed from what found in Western, capitalist countries. During the Soviet era, the utopian idea to create an egalitarian society ended in a hierarchically organised and heavily institutionalised society in which access to political power became the basis for social stratification (ibid).

In the book series "Baltische Studien zur Erziehungs- und Sozialwissenschaft", Ellu Saar and several colleagues used data from multiple sources to shed light on transitions in the labour market and in Estonian social mobility (Saar, 2011). These analyses i.a. embraced the usefulness of formal education, informal ties and other resources acquired during the transition period. The authors observed that shifts in both the stratification order and the public perception of these changes frequently sparked tensions between long-held egalitarian values and the individualistic explanations of poverty that emerged following Estonia's neo-liberal shock therapy.

Among Estonian researchers who observed how the post-Soviet transition to a market economy engendered new social strata, some focused on housing reforms and privatisation. They then examined how these changes contributed to increased residential differentiation based on socio-economic status (cf. Ruoppila & Kährik, 2003). Two years later, Ruoppila (2005) pointed out that unlike Western European countries, Estonian housing policies did not aim to mitigate the effects of economic restructuring or prevent segregation. Further 10 years ahead, Tammaru et al. (2015) described how this trend continued in the form of a growing socio-economic segregation in Tallinn's bi-ethnic context, a segregation that Ellu Saar extensively analysed together with colleagues (cf. Lindemann & Saar, 2011; Helemäe & Saar, 2015; Saarts & Saar, 2020).

Broadly speaking, social stratification can be analysed by looking at the roots of stratification mechanisms or with a view to improve social policy instruments. As we will further enlarge on in the following sections, researchers at the Institute have been sensitive towards both perspectives, thereby caring for policy implications of their research findings.

COMPARATIVE EDUCATION SOCIOLOGY

As the Institute emphasised the interplay between education, labour markets and welfare systems, the sub-discipline of comparative education sociology caught attention. One major contributor to this strand is David P. Baker who advocates for rigorous comparative methodologies to understand the complexities of educational systems, while considering cultural, historical, and social contexts (Baker, 2014). After examining trends such as gender differences, governance methods, private tutoring, and curriculum development, his comparative approach discloses both global similarities and national differences in schooling (Baker, 2005). Baker's research extends beyond traditional achievement and attainment studies, by exploring how education influences citizenship and diversity in universities (Ramirez, 2006). He argues that education has become a powerful social institution, shaping modern culture and creating new educational paradoxes (Davidson et al., 2018).

Particularly when investigating lifelong learning in a comparative perspective, the Institute has been influenced by Peter Jarvis to whom one chapter is devoted in an overview entitled "British Scholars of Comparative Education". The main author, David Phillips, stated in 2020 that 'Peter Jarvis wrote and talked about adult education, lifelong learning, globalisation, and the learning

society long before these became established topics in the wider domain of mainstream comparative education and the wider educational community'.

Jarvis' studies of practical and theoretical aspects of adult education, as well as lifelong learning (cf. Jarvis 2003; 2007), fell in line with the Institute's work on educational inequality, social stratification, and transitions during the life span. These are also central themes in the sub-discipline comparative education sociology, as well as in typical historical approaches to sociology that are further discussed below.

COMPARATIVE AND HISTORICAL APPROACHES TO ECONOMIC SOCIOLOGY AND POLITICAL ECONOMY

Many works of the Institute implicitly or explicitly aligned with theories in the prolongation of a seminal work of Gösta Esping-Andersen (1990). The Institute soon enlarged this perspective by investigating education and training, labour market together with welfare regimes or systems. This approach complied with insights gained by scholars gravitating around the theoretical strand of "comparative political economy", which served as a theoretical foundation when researchers at the Institute delved into adult education and lifelong learning; cf. Saar et al. (2013c), Roosmaa (2021), Saar et al. (2023b). They were then confronted with typologies tending to become more and more complex, to the point of displaying hybrid systems.

Similar hybrid constellations were revealed in Eric Verdier (2013) who analysed trends in lifelong learning policies and structures in Denmark, Sweden, Germany, France and the United Kingdom. He concluded that all five countries are forming hybrids of two or more regimes related to their labour market, social welfare and education systems. This implies that the regimes captured by the perspective of "comparative political economy" should be seen as ideal-typical, whose value lies in illuminating the political choices that then need to be made (ibid). Verdier also pointed out that among the scholars working within this perspective, a regime is seen as the product of a specific social formation characterised by a distinctive class and political alliance. Regimes are shaped by certain institutional path dependencies, as well as by external shocks and political transformations.

Correspondingly, Campbell and Pedersen (2011) identified the hybrid character of regimes being studied from a perspective of comparative political economy. The authors analysed how different institutional forms of political economies are affecting the way in which "knowledge regimes" are organised and are operating. The authors found a weakness in the literature on "production regimes", which provided the concepts of liberal and coordinated market economies, notably when these two were used as simple dichotomous distinctions. Instead, these authors argued, the proliferation of hybrid forms should be acknowledged and conceptualised.

It is on this point important to note that comparative political economy does not address "knowledge regimes" in the same educational meaning as in the specific literature on adult education or lifelong learning. Instead, Campbell and Pedersen (2011) referred to sets of actors, organisations, and institutions that produce and disseminate policy ideas that affect how policy-making and production regimes are organised and operated. The authors stressed the importance of "knowledge regimes" because this concept contributes data, research, theories, policy recommendations, and other ideas that influence public policy and, thus, national economic competitiveness (cf. also Campbell & Pedersen, 2015). In this way, the notion 'knowledge regimes" is used to supplement the literature on 'production regimes' and "policy-

making regimes", so far dominant in comparative political economy (Campbell & Pedersen, 2011).

Some years later, Desjardins and Ioannidou (2020, p. 2) depicted the following panorama of comparative political economy when applied in the field of adult education and lifelong learning:

> "Education, training, adult learning and skills are central topics of the educational sciences including comparative education, but they have now become increasingly a focal point of interest for scholars of comparative politics and comparative economics. Typically, a common feature among these concepts is that they primarily deal with the political, economic and social institutions that affect the evolution of education and skill formation systems, policies and reforms as well as related distributional aspects and conflicts".

These two authors' distinct perspective on learners' participation can be summarised by this sentence: "…it is not just public spending on education or total welfare spending that matter, but rather structural factors relevant to social policy, institutional and public policy frameworks seem to play a prominent role in explaining the patterns of participation in organized adult learning" (ibid.).

In sum, the aforementioned theoretical strands and subsequent scientific investigations engendered or pointed towards nuanced typologies that shed light on adult education and lifelong learning. These typologies underpin advanced comparative analyses by refining perspectives on comparative political economy. Furthermore, in-depth country reports have nurtured typologies previously established from analysing large data sets. Comparative social research has also led to typologies that reflect characteristics of different groups of learners, which will be discussed in the next chapter.

Living and learning conditions for groups of learners

As a transition from the preceding sub-chapter, Saar et al. (2013a) noted that theories categorised under historical and organisational institutionalism, such as the seminal work of Meyer and Scott (1991), have rarely been used to explain adult participation. They then quoted Günther Hefler (2012) who pinpointed that these theories have primarily been applied to examine cross-sectional or country differences. Institutional approaches may explain participation by the emergence of beliefs in societies that education is a means for achieving legitimate goals. Such beliefs become institutionalised on coercive, normative and cognitive levels (see also Scott & Meyer, 1994).

Works of the Institute have simultaneously addressed institutional aspects around the political economy of adult education, as well as participatory aspects of various groups of learners. Lifelong learning puts in the forefront learner's trajectories in formal, non-formal or informal contexts. When analysing these contexts, the Institute i.a. sought inspiration in the Bounded Agency Model as applied in the field of adult education. This model theorises relationships between key concepts like agency, empowerment and belonging, in order to understand social and structural barriers (cf. Clancy & Holford, 2023). The model reflects that adults possess agency (i.a. intent and motivation) for crafting their learning trajectories. Yet that agency is bounded by multilayered structures, e.g. welfare-state regimes, labour-market rules, the practices of learning providers, and family responsibilities.

Building on previous conceptualisations, e.g. Cross (1992) and Evans (2007), the Bounded Agency Model was first systematically applied to adult education in Rubenson and Desjardins (2009). With a distant nod to established theories on bounded rationality, their article advanced the concept of bounded agency to account for the interplay between structural and individual barriers to participation. The authors built on power-resources theory for understanding interactions between labour, capital and public policy; the latter illustrated by different types of welfare state regimes. Rubenson and Desjardins demonstrated in this article that public policy is affecting interactions between structure and agency, while recognising "the non-linearity and feedback mechanisms associated with an individual's decision to participate" (ibid.) Hence, by integrating the structural and individual dimensions of learners' motivation, alongside linking them to distinct welfare regimes, the model proposed by Rubenson and Desjardins was able to bridge institutional approaches to adult education with comprehensive analyses of learning trajectories, such as requested in Saar et al. (2013a).

From the standpoint of the Institute's affiliated researchers, examining distinct learner groups appeared as a logical extension of their investigations into social-stratification patterns. Much of the foundation for this approach was laid in an anthology edited by Ellu Saar, which provided a broad analysis of macro-level institutional changes as well as micro-level risks and opportunities for various strata of the Estonian population (Saar, 2011). When this approach was later pursued from the specific angle of lifelong learning, the reasons for not participating in education and training were scrutinised. Hence, Roosmaa and Saar (2017) underlined the importance of analysing interactions between macro-level factors and micro-level dispositions:

> "……research into reasons for not participating in adult learning should not be limited to micro-level predictors. We might conclude that rather than seeking to impose a single 'best model', Europe's policies on adult learning must work with and through the institutional frameworks. Otherwise there is a danger that certain elements quite distant in nature of institutional reality in the country will be introduced, [thus] generating ineffective social practices."

When examining distinct learner groups, researchers at the Institute also interacted with life-course research, which concentrates on learning trajectories, for example the life and learning history of adults. This research tradition allows for micro-level studies of individual learners' motivation, for example to enrol in or opt out from education and training. Yet, it also comprises studies that integrate motivational and institutional aspects while analysing longitudinal data (cf. Blossfeld, 2019), which complies very well with the research interests of the Institute. This alignment was already evident in the 2014 anthology Adult learning in modern societies: An international comparison from a life-course perspective (Blossfeld et al., 2014), to which also Ellu Saar and colleagues contributed by the chapter Cumulative Inequality Effects of Adult Learning in Estonia (Saar et al., 2014).

While the last-mentioned paper depicted a broad picture of participation patterns in adult education to shed light on occupational class mobility in Estonia, subsequent contributions from the Institute more specifically analysed the gender gap of learning trajectories over a life span (cf. Roosalu & Hofäcker, 2016; Roosmaa & Aavik, 2016).

These later contributions on the living and learning conditions of learner groups also delved into comparisons among country clusters. During such investigations, the Institute has been concerned with the specific situation of post-Soviet countries, notably the Baltics among which

Estonia has a large contingent of Russian-speaking second and third-generation citizens. On this point, Lindemann and Saar (2011) wrote:

> "In Estonia, contrary to many other European countries, the overall educational attainment of second-generation immigrants has, compared to their parents, diverged from the educational attainment of the native population (…..) Adolescents' own language proficiency and citizenship have a strong impact on educational decisions. We conclude that the Estonian education system contributes to the emergence of ethnic differences. While basic and secondary schools function in either the Estonian or Russian languages, the curricula in public higher education institutions are taught mainly in Estonian, which might lower expectations of success amongst Russian adolescents."

Some years later, the Institute pursued these observations by identifying a weak public discourse on the class basis of economic reforms and policies, which i.a. reduced the 'societal capacity to collectively resist Estonia's extreme neo-liberalization' (Helemäe & Saar, 2015). Interestingly, the complex interplay between old and new social structures when shaping the country's post-Soviet development, resembles the description of social-structural, socio-economic and employment-related framework conditions found in a comparison of learning experiences and conditions in the eastern and western parts of Germany after the reunification in 1990 (cf. Woderich et al. , 2004, p. 201).

The cited interplay, and comparisons of living and learning conditions in general, have nurtured typologies, of which one delves into how disadvantaged adult learners are engaged in lifelong learning. This typology was developed in the frame of an EU research project in which also the Institute was involved. The researchers took as their point of departure that participation in lifelong learning is influenced by factors at the individual, provider, and country levels, cf. ENLIVEN (Encouraging Lifelong Learning for an Inclusive and Vibrant Europe).

More specifically, this research team produced a country typology of welfare regimes and adult education infrastructures. Within the post-socialist type, a neo-liberal variant was identified, exemplified by Estonia. This country is said to resemble liberal states in that they all have more general than vocational education, and higher fees at post-secondary level. Participation in adult education is at a medium level and unevenly distributed.

The post-socialist type also contains an embedded neo-liberal variant, for example upheld by Slovakia. The country is claimed to move towards a German-speaking model when it develops pathways for vocational and educational training (VET). This variant features quite low participation in adult education and quite low inequality in participation. Finally, a post-socialist Balkan variant is identified, among which Bulgaria "continues to be influenced more by the Soviet education system than are the other types". Furthermore, Bulgarian secondary education combines elements of general and vocational education, participation in adult education is low with inequality in participation, and training is only provided by a limited number of companies.

In common across the three post-socialist variants is minimum income protection, with less developed active labour-market policies than what found in conservative-continental and liberal regimes. Beyond post-socialist countries, Desjardins and Ioannidou (2020) underscored that the use and extent of social-policy instruments can be crucial to foster the development of adult learning opportunities. One example is public funding of active labour market policies and support to open and flexible education courses. This point is amplified in Roosmaa (2021, p. 75)

who argues that active labour market policies, combined with a diverse provision of adult learning, and strong trade unions or collective bargaining coverage "have the potential to increase adult education and training participation and distribute it more equitably".

In a recent book, Jan Kalenda (2024) distinguishes between studies dealing with research on adults' participation in organised learning and, on the other hand, the political economy of adult education. He correctly underlines that these fields are two sides of the same coin. Yet he is faced with the same challenge as our preceding text on theoretical strands; namely that contributions from the same research group can be cited under both thematic fields. That said, his contribution offers valuable post-1989 insight into Poland, the Czech Republic, Hungary, and Slovakia; four countries sharing similar institutional backgrounds and societal challenges, but having followed divergent trajectories during the past three decades. When also accounting for post-1989 insights acquired by the Institute, i.a. into the Baltic States, learning trajectories and national development paths for multiple post-socialist countries are therefore sufficiently described to suggest some implications for how cross-national policy instruments of the EU can interact with national policies.

Implications for EU support to national policy making

The Institute has been extensively involved in elaborating cross-country typologies, often in the frame of EU-funded projects that generate insights for shaping EU policies. Thereby, the typologies also touch on how European institutions are supporting national policy making. This intertwinement can be illustrated by the reflections on post-socialist and post-Soviet pathways provided by several researchers at the Institute. Such pathways are relevant for transition countries that nowadays are coming closer to or perhaps are about to join the EU. Below, we therefore look further into EU policy making by comparing the Institute's theorisation of post-socialist transitions with contemporary efforts to assist transition countries in matters of adult education and lifelong learning.

Saar et al. (2023b) commented on initiatives launched during the 1990s for education reforms in transition countries, particularly among the CEE countries that later became members of the EU:

> "….the reform-centred countries with their enthusiasm to renew institutions were lacking in education and training provisions for adults. Overall, in these transition economies, one of the key problems was not the low educational level of the population, but rather the orientation towards preparing the workforce, which often specializes in a narrow technical field and is employed in the contracting sectors and the professions. Therefore, the availability of further education in terms of acquiring skills and competences was of great importance, which made these countries rather similar to the dominant lifelong learning policy trends in the EU at the time."

The authors thereafter reminded us of a key aim of the European agenda for adult education and lifelong learning, namely to promote social citizenship and cultural participation. The same aim was of "high rhetorical relevance during the socialist period, but turned out to be perceived less crucial during the post-socialist transition where aspects of economic transition were prioritised (ibid)."

This diagnosis suggests that the EU adult education policy was not always highly relevant when post-socialist countries tried to meet social and cultural challenges beyond those related to the

labour market. This restriction raises the question of how the EU agenda of adult education (and lifelong learning in a larger sense) is able to take care of the specific situation of new Member States once they are integrated in EU policy and decision-making. A first pillar of this integration is to adopt the collection of common rights and obligations that constitute the body of EU law, later incorporated into the legal systems of EU Member States, known as the Acquis Communautaire.

In another publication from the same year, researchers at the Institute commented on EU policy documents, i.a. "A New Skills Agenda for Europe" that highlights the role of skills as a pathway to employability and prosperity' (Saar et al., 2023a). The authors identified an inclination in national and EU policy documents to represent low-skilled young people as a problem, while the demand side (the labour market and employers) was established as an exogenous force with needs that must be fulfilled. This inclination could also refer to the criticised 'subjectivisation' of the right to engage in further and continuing training through a scheme of individual learning accounts; a criticism made when such a right is not sufficiently regulated by collective conventions or arrangements (see e.g. Mias et al., 2021).

Ten years earlier, Saar et al. (2013b) wrote that Estonia's first decade after independence was marked by increased inequality of access to education: "The neo-liberalising of society, workplaces and of the education system, meant that human capital did not enjoy continuous development". For transition countries in general, the EU gave them in many cases early access to education and training projects or programmes, for example the specific programme TEMPUS, which was set up in 1990 to assist higher education institutions in structured cooperation. TEMPUS was part of the overall programme of Community aid for the economic restructuring of Central and Eastern Europe countries, known as PHARE.

For transition countries of today, a strategy called "A credible enlargement perspective for and enhanced EU engagement with the Western Balkans" was adopted in 2018. It proposed an "even stronger focus on the fundamental reforms essential for success on the EU path". This should go before future negotiations according to the Acquis Communautaire, i.a. on competitiveness and inclusive growth sustained by education and culture (COM (2020) 57 final). Moreover, a doubling of funds to the whole region from the Erasmus+ programme was foreseen for the period 2019-2020 (COM(2020) 625 final). This support was confirmed in a 2023 Communication on the EU Enlargement Policy, cf. COM (2023) 690 final. However, candidate countries' rapprochement with EU policies is currently slowed down, cf. Turčalo and Smajić (2024).

The phrase "fundamental reforms essential for success on the EU path" (and the further specifications) corresponds to the previously mentioned plea for labour market training and economic reforms, which was communicated to post-socialist countries during the 1990s. No doubt that the Western Balkans in many ways would make progress by being put on an EU path. The main mechanism behind this switch to another path is the Acquis Communautaire that form the basis of accession negotiations with each candidate country. The solicited 'fundamental reforms' are meant to prepare the candidate countries for all chapters (presently 35) of the Acquis (cf. the Enlargement and Eastern Neighbourhood webpages of the European Commission). When overviewing the post-Soviet transition in Estonia, researchers at the Institute observed however that this process did not allow human capital in Estonia to "enjoy continuous development" (Saar et al., 2013b).

A look into European policy-making reveals numerous soft policy or governance instruments. Among the scholars investigating these instruments, Arrowsmith et al. (2004) claim that the European Commission seems to prefer 'loose learning networks' generating 'improvement-oriented benchmarking' within a 'consensual exercise' in line with the Open Method of policy Co-ordination (OMC). Apart from benchmarking, all other governance instruments listed by authors who address the OMC tend to imply a more or less pronounced role for civil society actors (Papadopoulos, 2010). Among these instruments count co-regulation, negotiated agreements or voluntary codes of conduct; in addition to policy borrowing, exchange of best practices and mutual policy learning. Some researchers even tend to consider the OMC as cross-national policy learning (cf. Paster, 2005). Lange and Alexiadou (2007) identified three key characteristics of the OMC: its flexibility and reflexive nature when relying on 'soft law', alongside its preference for "New Public Management tools of objectives, benchmarks and indicators". Above all in the field of education policy, Lawn and Grek (2012) argue that the limited competences ceded by Member States to EU institutions have led the Union to rely on soft-governance instruments.

Several of the policy instruments discussed by the cited scholars are mentioned in an EU Council Resolution, called a new European agenda for adult learning 2021-2030 (Official Journal 2021/C 504/02). The monitoring of its implementation will be carried out by systematic collection and analysis of comparable data, which is said to provide 'an essential contribution to evidence-based policy-making'. As specified in Annex II of the resolution, "annual monitoring will take place through the Education and Training Monitor and the European Semester process (through the revised Social Scoreboard), tracking progress towards achieving all agreed EU-level targets in the field of adult learning."

Furthermore, "when reporting on progress towards achieving these objectives, (……), the Commission should take into account specificities of different national systems and circumstances. Member States should make full use of Union funding opportunities in line with their national circumstances, priorities and challenges" (ibid).

The resolution's soft wording on how Member States' specific situation should feed into the monitoring of the progress they are making, refers back to the non-coercive (but often insisting) manner in which EU institutions make use of the Open Method of policy Co-ordination. The assurance that the specificities of different national systems and circumstances are reflected through data collection from the Member States, is certainly beneficial for national policy making. However, a review of the instruments belonging to the OMC indicates that the mechanisms for translating data from monitoring processes into policy more or less enlightened by evidence are still to be proposed, particularly if these mechanisms should compensate for country deficiencies in a certain policy area (cf. Ure, 2015). Faced with this lacuna, it appears that a thoughtful application of typologies can primarily inform policy-making if one compares what should be compared to gain real insight, for example avoiding exercises of mutual policy learning that mainly export experiences acquired under completely other circumstances.

Conclusion and outlook

As pointed out in the preceding sections, researchers at the Institute observed that the lifelong learning discourse in their country was dominated by a rather instrumentalist and labour-market driven perspective (Saar et al., 2013b). This stemmed from the complexities of Estonia's post-Soviet transition, which has left civil society with limited means to sustain a pluralistic discourse

on lifelong learning. On a European scale, and after analysing data from several Adult Education Surveys, Roosmaa (2021, p. 75) concluded that institutional complementarities and interdependency make it difficult "to suggest examples of institutions or policies that should be copied or implemented universally. Instead, (the European) policies on adult learning should work with and through the specific institutional frameworks of the countries".

Recognising then that EU adult-learning strategies are mediated by national institutional architectures, how can typologies be used to improve cross-border policy learning aimed at adult learners?

In the end, appeals to typology-driven policy learning seem overly optimistic, given the inherently politicised nature of cross-border learning processes. Instead of advocating a wholesale "scientification" of interactions between national and European institutions in the field of adult or lifelong education, emphasis could be placed on gradually weaving scientific insights into policymaking, reinforced by more precise learning from examples drawn from countries belonging to the same typology. Furthermore, each type of the typology may even consist of variants. Yet the fact that a typology of national systems can unfold into several variants does not diminish its explanatory power, even when an analysis reveals a fragmented picture, such as the differences between the post-Soviet republics in the Baltic area. Moreover, the text above should have demonstrated that a typology is primarily a heuristic tool for illustrating mixed or hybrid national systems. This could serve as a reminder during the identification of experiences with high potential for mutual policy learning.

About the author

Cand. polit. Odd Bjørn Ure is independent researcher and consultant who works in his own company, named *Consultur_Studies & Analyses*. His latest activities covers different strands of the EU programme Erasmus+. On behalf of Horizon Europe, Ure also assesses project proposals and monitors ongoing projects at the intersection between research and education. His professional background encompasses national research strategies and industry–academia cooperation. He served as visiting scientist at the Institute of Prospective Technological Studies of the EU Joint Research Centre. His history of collaboration with RASI started during the EU research project "Lifelong Learning 2010", winding up its activities in a book published in 2013. Ure was then leading the Norwegian country team engaged in that project, under the overall coordination of late Ellu Saar. Prior to this project, he was part of a country team carrying out another EU research project on lifelong learning, entitled Eurone&t (cf. M. Kuhn, R. Sultana (eds.) *Homo sapiens Europaeus? Creating the European Learning Citizen)*. His general research interest lies in investigating whether traditional educational fields (e.g. vocational training, adult learning and higher education) converge into redefined concepts, such as lifelong education or lifelong learning.

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