



**Empowering vulnerable
adults to learn: agency and
regional level conditions to
learn**

**Exploring individual factors and contextual factors
stimulating or hindering learning of vulnerable adults**

Simon Broek

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PhD Dissertation, Open Universiteit, Heerlen

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Empowering vulnerable adults to learn: agency and regional level conditions
to learn

Exploring individual factors and contextual factors stimulating or hindering
learning

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Foreword and acknowledgements

When I was studying Philosophy, I once had the ambition to pursue a PhD. Even later, after I had started working as a policy researcher at Research voor Beleid, I made plans to undertake a PhD in Philosophy in Germany. Those plans came to an abrupt end at a conference in Giessen (I believe), where I realised that I felt completely out of place. In the end, this PhD never materialised.

For that, I am eternally grateful. It prevented me from pursuing an academic career and instead led me in a direction that suits me much better: conducting policy research on a wide range of topics and eventually establishing a research and consultancy firm, Ockham IPS, which has since been quite successful in carrying out many studies and evaluations for an even wider range of clients.

One red thread ran through the past seventeen years of research, namely the research work on adult learning. This began with studies for the European Commission on adult learning professionals, their key competences, and reflections on ongoing reforms. This work later expanded into many studies for organisations such as UNESCO, Cedefop, the European Training Foundation, OECD and the ILO, as well as Dutch clients including the Ministry of Education, Culture and Science. I am deeply indebted to all these organisations, to the people who supported these studies, and to the many research teams with whom I collaborated. They all contributed to my knowledge and understanding of the adult learning field and supported me in growing both as a policy researcher and as a person.

The fact that I am today (5 June 2026) defending my PhD thesis is therefore not the result of a long-cherished dream or a conscious decision to pursue an academic career. It is rather a case of *l'occasione fa il ladro*, opportunity makes the thief. For this opportunity I must thank the Dutch Research Council (NRO) for launching a research call on lifelong development, and especially Prof. Dr. Marinka Kuijpers, who suggested including PhD positions in the project proposal.

This delayed, project-based PhD pathway worked well for me. It allowed me to build on the knowledge I had already accumulated through years of

policy-oriented research and embed it within a more rigorous theoretical and methodological framework. It encouraged me to explore fundamental theoretical perspectives and paradigms that may help explain why it is so difficult to re-engage certain adults in vulnerable situations in learning, and how such issues can be studied in a holistic way that allows adults themselves to reflect on both the barriers and the enabling factors affecting their learning. The insights gained through this PhD can be directly applied in my ongoing policy research.

For me, therefore, this PhD is not a life-changing moment or a major personal achievement. Rather, I see it as the unplanned but nevertheless highly valued outcome of seventeen years of continuous work in adult learning policy research. For that reason, the list of people to thank is long. I have already mentioned the organisations to which I am indebted; here I would like to focus on the individuals who more directly supported me in completing this PhD.

First of all, I would like to thank Bert-Jan Buiskool. We have worked together for many years and have walked much of the path of adult learning policy research side by side. It was also you who brought the partners together to submit the proposal for the NRO call. Without you, I would not be standing here today, and certainly not with you beside me as paranymp, ready to take the blow if necessary.

Secondly, I would like to thank my promotors and supervisors, Prof. Dr. Marinka Kuijpers, Prof. Dr. Judith Semeijn, and Dr. Josje van der Linden, for their critical reflections, constructive discussions, and positive outlook. Under your supervision, I never doubted that we would reach the end of this journey.

Thirdly, I would like to thank the wider NRO project team, in particular Johan Coenen, Marco Mazereeuw, Douwe Grijpstra, Isabel Bermans and Meghan Clarke – as well as the steering committee, for supporting the data collection and offering valuable reflections and suggestions.

Fourthly, I would like to thank my family (Bea and Bram) and my parents-in-law (Wilma and Cor), and close friends (especially Bastiaan, my paranymp) for their support and continued interest in my work.

Fifthly, I would like to thank the more than one hundred people I interviewed during this PhD, as well as the anonymous reviewers of my published articles and the journal editors, for their constructive feedback and helpful suggestions.

As Karel Čapek writes in *An Ordinary Life* (own translation from Dutch), “Each of us is a ‘we’, each a multitude fading into the immeasurable distance.” In other words, each life contains a thousand lives before it. The same can be said of a PhD: it is never an individual achievement, but always an achievement of the whole of humanity, and as a result, the benefits of a PhD should therefore be for humanity as well – feeding policy development, instead of only individual careers.

My deepest thanks, however, go to my inner circle: my wife Elja and my daughter Lola. They are always there for me, offering reflections, suggestions, and, perhaps most importantly, a sense of perspective. Without them, none of this would make sense.

Finally, and this will be a big bone, I would like to thank our dog Bobbie. Our daily walks often gave me the space to reflect and reconsider. Without knowing it, he has been an *unmoved mover* with a profound understanding of what constitutes a good life.

Chapter 1: Introduction

Adult learning has gained increasing policy attention internationally, in Europe, and in the Netherlands. Yet despite decades of attention and initiatives, structural challenges persist, particularly regarding the participation of vulnerable adults. This chapter outlines the policy context, the systemic challenges of adult learning participation, and the emerging importance of regional collaboration, which together motivate the research questions. Following the presentation of research questions, this introduction will outline the theoretical and empirical approach of this dissertation.

Policy context

Over the past three decades, adult learning and related concepts like lifelong learning (LLL), or lifelong development (LLD) (*leven lang ontwikkelen (LLO)* in the Dutch context (amongst others: Kuijpers et al., 2025), have evolved from a policy aspiration into a central tenet of international, European and national education strategies.

Internationally, adult learning is a core element of Sustainable Development Goal (SDG) 4, which seeks to achieve inclusive, equitable, and quality education and lifelong learning for all by 2030 (UNESCO, 2015). Adult learning is in the SDGs seen as both an objective in itself and as a means to support reaching other SDGs: to support health lifestyles, improve gender equality, reduce poverty (amongst others), adults will need to continue learning and obtaining skills (Grotlüschen et al., 2024). In line with this global prominence of adult learning and lifelong learning, international organisations increased their focus on these topics and integrated them in their global strategies and programmes (ILO, 2023; UNESCO, 2022).

At European level, the European Commission (European Commission, 2007, 2017) has continuously emphasised that lifelong learning is essential to equip citizens for a knowledge-based economy, to foster adaptability in the face of globalisation, and to strengthen social cohesion. This broader agenda is also reflected in the European Pillar of Social Rights (European Commission, 2017) and the Council Resolution on a new European agenda

for adult learning 2021–2030, which together underline the urgency of ensuring that all adults can access learning opportunities at different stages of life (Council of the European Union, 2021). In addition, the 2025 Herning Declaration, reemphasises the aim to increase participation of all adults in up- and reskilling, also to turn into reality the right of individuals to quality and inclusive education, training and lifelong learning (Council of the European Union, 2025). Adult learning is hence both seen as needed for economic development and as a social right, needed for well-being, citizenship, and equity.

In the Netherlands, the policy emphasis on adult learning and LLD has intensified in recent years. The government's Education Agenda LLD (Onderwijsagenda LLO) (Ministerie van Sociale Zaken en Werkgelegenheid & Ministerie van Onderwijs, Cultuur en Wetenschap, 2018, 2020) explicitly calls for increased individual agency towards learning, greater flexibility in educational provision and the introduction of individual subsidies to make learning more accessible, particularly for adults with limited qualifications and those who have been out of formal education for some time. In addition, the decentralisation reforms of the past decade have placed a stronger responsibility on municipalities and regional partnerships to support adults in vulnerable positions, for example in the context of the Social Support Act (Wet Maatschappelijke Ondersteuning (WMO)) and the allocation of the Adult and Vocational Education Act (Wet Educatie en Beroepsonderwijs (WEB)) funds for adult education. This reflects a broader policy shift: by moving responsibilities closer to local actors, the aim is to better align support with the specific needs of adults and to foster collaboration between educational institutions, employers, public employment services (UWV) and welfare organisations (and at the same time, save costs). Whether this policy shift is effective in mobilising adults to learn can be questioned as many reports indicate that those who need education most are not (yet) effectively reached (Algemene Rekenkamer, 2016; De Greef & De Haan, 2024; Groot et al., 2025).

Challenges of adult learning systems – low participation of those who need it most

Adult learning and lifelong development systems in the Netherlands, and in other countries face severe challenges that hinder their contribution to the

economic, social goals and the goal of self-fulfilment. Without providing a full analysis of the LLD system (see for this recent more all-encompassing publications (Ockham-IPS et al., 2025)), here the key issue of low participation is particularly discussed. Focussing on the Netherlands, participation rates among vulnerable groups remain low. Recent analyses indicate that around 1.8 million adults in the Netherlands have low literacy skills (Buisman et al., 2024), which hampers their participation in both work and society. Many low-qualified, older, or unemployed adults experience multiple and cumulative barriers to learning, ranging from financial obstacles to difficulties in navigating complex institutional landscapes (Künn et al., 2018; Panteia, 2019; SCP, 2023). In particular, those with limited digital literacy often struggle to access online training opportunities, an issue that is becoming increasingly acute in the context of digitalisation (OECD, 2021; SCP, 2024b). This situation is not unique for the Netherlands, There is wide ranging evidence of similar challenges in other countries (Boeren et al., 2023; Heisig et al., 2024; Kalenda et al., 2023).

This highlights a central paradox, well known in (inter)national literature (also referred to as the ‘Matthew principle’): the groups of vulnerable adults that would benefit most from adult learning are least likely to participate (Boeren, 2009, 2017; Marcaletti et al., 2018; Roosmaa & Saar, 2017). Vulnerability can be defined as a condition in which individuals face heightened exposure to risks and limited capacity to respond to or recover from them, socially, economically, or educationally. In the context of adult learning, vulnerability refers to adults whose opportunities to engage in and benefit from learning are constrained by a combination of personal, social, and structural factors. These may include low educational attainment, poor health, precarious employment, limited social networks, or negative prior learning experiences, which together reduce a person’s aptitude to start learning. From this, it emerges that without careful consideration of the real challenges of vulnerable individuals, policies risk reproducing the very inequalities they seek to overcome (Boeren, 2009).

Search for a sustainable infrastructure: the role of regional governance and collaboration

The persistence of low participation rates, especially among vulnerable groups, has prompted policymakers and researchers to look beyond

individual factors to the wider learning ecosystems in which adults make decisions. This shift has directed attention toward the regional level, where organisations, local governments, and networks intersect and where many practical barriers, or enabling conditions, are experienced directly.

Recent analyses and reflections on the Dutch adult learning and LLD system (Ockham-IPS et al., 2025) suggest that despite the increased policy emphasis on LLD, existing initiatives are often supply-driven, project-based, and temporal in nature. This is hampering them to solve participation issues. As indicated by the Social Economic Council (Sociaal Economische Raad: SER), an overarching connecting framework is lacking (SER, 2024a) and recent temporal initiatives have not sufficiently supported the development of a sustainable infrastructure to support vulnerable adults to learn (Cedefop, 2024; Groot et al., 2025; SEOR & Ockham IPS, 2024). Particularly in the field of basic skills, where vulnerable adults are most in need of consistent, long-term support, the reliance on tender-based project funding has led to repeated cycles of set-up and wind-down (De Greef & De Haan, 2024; Thunnissen, 2021). This not only creates discontinuities in provision but also results in the loss of accumulated expertise among practitioners and a lack of sustained investment in quality improvement. As a result, many adults with low literacy, numeracy, or digital skills remain underserved, despite being a central target group in both Dutch and European policy agendas (De Greef & De Haan, 2024).

As the learning of adults does not occur in isolation, a potential solution to better serve these (or all) adult learners is to focus on regional level ecosystems that connect individuals, organisations and policies. The concept 'ecosystem' (Spours, 2024) emphasises the importance of collaboration between municipalities, employers, VET institutions, higher education providers, libraries, and welfare organisations (Barnes et al., 2019; Borkowska & Osborne, 2018; Longworth, 2019). Also in the Netherlands, the regional level is more and more seen as the level at which ecosystems need to be developed that are conducive for adults to learn. This approach recently received renewed impetus in the reform on regional labour market structures and the development of Regional Workcentres and regional councils involving social partners, municipal stakeholders and representatives of educational providers (as defined by the Work and

Income Implementation Structure Act (Wet structuur uitvoeringsorganisatie werk en inkomen) (SUWI)).

Studies on the effectiveness of learning cities and learning regions show that they expand learning opportunities, diversify programmes, strengthen partnerships across sectors, and stimulate community-level change (Byun & Ryu, 2012). Byun and Ryu's research on Korea's Lifelong Learning City Project illustrates, for instance, that learning cities can indeed foster inclusive learning cultures by expanding programmes tailored to local needs, strengthening literacy provision, and creating partnerships that connect education, labour and welfare services (Byun & Ryu, 2012). These partnerships, such as start-up support programmes for marginalised groups or community-building initiatives in underdeveloped neighbourhoods, demonstrate how regional-level initiatives and partnerships can reduce barriers to participation and empower residents to take on active learning roles. Yet, the evidence also highlights that such outcomes require intentional organisational development strategies, sustained municipal commitment, and explicit attention to social vision and equity. Without these, regional learning structures may succeed in broadening provision but still fall short in enabling vulnerable adults to develop ownership over their learning trajectories or in addressing deeper structural and motivational barriers to participation. Hence, less is known about how these regional-level partnership ecosystems are able to support ownership of vulnerable adults' own learning and development pathway, and how these regional structures can level specific individual challenges related to even considering learning as a relevant option.

These developments raise deeper analytical questions about what vulnerable adults need in order to consider learning a meaningful option and how regional structures can contribute to expanding such opportunities. These questions guide the dissertation.

Research questions

Against this background, the present dissertation explores the following key question:

What is needed for vulnerable adults to start learning, and which conditions of regional level learning cultures foster such learning?

This key research question is further operationalised in two sub-questions:

- 1) Which intrinsic and extrinsic factors enable or hinder vulnerable adults to take up learning, and how do these factors shape their transitions into learning?
- 2) What are the success factors for regional learning infrastructures and inter-organisational cooperation that enable vulnerable adults to engage in learning?

Theoretical perspectives

The key research question and sub-questions of this dissertation sit at the intersection of several strands of academic debate. Understanding what might enable vulnerable adults to begin learning, and which regional conditions could foster such engagement, potentially requires perspectives that address the value of adult learning, the role of individual agency, and the influence of regional environments. No single theoretical tradition appears to capture all these dimensions on its own. For that reason, this chapter draws on three complementary fields of scholarship, each of which highlights a different aspect of the topic.

The first field examines how the role and purpose of adult learning have been conceptualised, ranging from economically oriented perspectives to broader social and human development approaches. The second field turns to theories of participation, barriers, and agency to explore why adults may or may not take up learning opportunities. The third field considers how agency is exercised within particular social and spatial contexts, with a focus on regional learning cultures and infrastructures.

Together these fields they could offer a multi-layered view of the mechanisms that shape learning engagement. Each field sheds light on one element of the puzzle: the value and outcomes of learning, the motivations and constraints affecting individuals, and the contextual conditions that support or limit agency.

The discussion of these three fields does not aim to provide an exhaustive account of all theoretical work in adult learning. Rather, it seeks to identify themes that appear most relevant for the research questions guiding this dissertation. The fields should therefore be viewed as complementary rather than hierarchical or mutually exclusive. Bringing them together may help build a more holistic understanding of the challenges facing vulnerable adults. Their insights, taken together, help prepare the ground for introducing the capability approach as a possible overarching framework for integrating these theoretical elements.

Field 1: Theories on the role of adult learning: Priority on individual and social benefits

The role of adult learning can be conceptualised from multiple theoretical perspectives, ranging from economically driven human capital models to broader approaches emphasising social inclusion, personal development, and human capabilities.

A dominant lens in policy debates is the human capital perspective (Becker, 1964), which treats adult learning as a strategic investment in skills to enhance productivity and economic growth. In the Netherlands, concerns about stagnating labour productivity, linked to low levels of innovation and limited adoption of labour-saving technologies, including artificial intelligence, have intensified the policy focus on lifelong development (CBS, 2025; Erken, 2024; Gaastra, 2025; TNO Vector, 2024). From this viewpoint, lifelong learning is positioned as a key lever for maintaining international competitiveness (Stoffers et al., 2020). Both national reports (CPB, 2022), and the European Commission's Draghi Report (Draghi, 2024) argue that structural and sustained investment in lifelong learning and skills development is essential for economic resilience, rather than a discretionary luxury.

However, limiting the value of adult learning to its economic returns overlooks its broader societal and individual significance. Research (SCP, 2023, 2024b, 2024a) demonstrates that learning plays a central role in strengthening livelihood, particularly for adults facing insecure work, having a poor health situation, or who can only to a limited extent build on social networks. Beyond enabling access to employment, lifelong development supports individuals in coping with transitions, building resilience, and

exercising a sense of control over their life course. For many, especially those with lower levels of education, participation in learning can increase self-confidence, expand social capital, and improve overall well-being (Balatti & Falk, 2002; Feinstein & Hammond, 2004).

These wider benefits align closely with the view of adult learning as a public good, particularly for vulnerable adults (Ockham-IPS et al., 2025). Economists have long emphasised that goods generating positive externalities tend to be underprovided by markets (Musgrave, 1939; Samuelson, 1954). Adult education is an illustrative case: while individuals benefit through enhanced skills and employment opportunities, society gains through higher productivity, greater social cohesion, better health outcomes, and reduced welfare dependency (Desjardins & Rubenson, 2013; Locatelli, 2018). Recognising adult learning as a public good therefore requires policy approaches that go beyond narrow economic metrics and acknowledge the collective value of participation.

Bringing these perspectives together, the capability approach (Boyadjieva & Ilieva-Trichkova, 2021; Nussbaum, 2013; Robeyns, 2005; Sen, 1999) provides a comprehensive framework for understanding the role of adult learning. Rather than viewing learning solely as an investment in labour market skills, the capability approach conceptualises education as a means of expanding individuals' real freedoms to lead the kinds of lives they value. From this perspective, adult learning enhances not only employability but also agency, resilience, well-being, and social inclusion. A growing body of scholarship supports this view, demonstrating the contribution of lifelong development to individuals' ability to navigate transitions, participate fully in society, and shape their own life trajectories (Boeren, 2017; de Greef et al., 2012; SCP, 2024a). This dissertation therefore adopts the capability approach as its conceptual starting point, placing adults' real opportunities, agency, and well-being at the centre of analyses of participation in, and outcomes of, lifelong development.

Yet, while Field 1 highlights the broader value of adult learning, it does not explain why participation remains unequal or how individual and contextual conditions shape access to these benefits. To address these limitations, the analysis turns to theories of barriers and agency.

Field 2: Theories around barriers to participation and agency: Focus on an all-encompassing concept of human agency

If adult learning generates wide-ranging benefits, why do some adults participate while others do not? This second theoretical field explores how adult learning scholarship has sought to explain these persistent participation gaps, initially through the classic focus on barriers, and more recently through broader conceptualisations of human agency.

Adult education research has long examined the constraints that limit adults' engagement with learning. Cross's (1981) influential work identified three categories of barriers: situational (linked to personal circumstances such as family responsibilities or financial pressures), institutional (arising from restrictive practices such as inflexible provision or entry requirements), and dispositional (related to attitudes, self-confidence, and prior educational experiences). This tripartite typology remains widely used, and subsequent studies have further refined it (Roosmaa & Saar, 2017). These models have been valuable in mapping obstacles to participation. Yet by concentrating predominantly on barriers, such approaches risk portraying adults as primarily constrained rather than as active agents. As Regmi (2015) argues, this framing tends to depict barriers as forces that impede otherwise rational individuals who seek learning merely to avoid falling behind.

To move beyond this deficit lens, scholarship increasingly incorporates theories of human agency derived from andragogy, psychology, and sociology. The concept of agency refers to individuals' capacity to make choices and act on them in pursuit of their goals (Bandura, 2001; Emirbayer & Mische, 1998). Within andragogy, agency is closely linked to self-direction, a central feature of Knowles' (1984) theory: adults are assumed to be autonomous, motivated to learn, and capable of managing their own learning processes when placed in supportive environments. Psychological perspectives add further nuance. Self-determination theory (Ryan & Deci, 2000) identifies autonomy, competence, and relatedness as core psychological needs that underpin intrinsic motivation. Social-cognitive theories highlight the importance of self-efficacy, belief in one's capability to succeed (Bandura, 2001, 2010). Low self-efficacy, in particular, is consistently associated with withdrawal from learning opportunities.

Consequently, removing external barriers alone is insufficient for building inclusive adult learning systems; activation also requires supporting learners' motivation, confidence, and sense of efficacy.

While these perspectives often view agency as a precondition for learning, critical theories emphasise that agency is also shaped through learning, especially for vulnerable adults. Paulo Freire (2000) conceptualises education as a practice of freedom, a process in which learners develop critical consciousness and the ability to take control over their lives. From this perspective, participation in adult learning can itself generate greater agency, particularly among those who have been marginalised. This reframes the relationship between agency and learning as a recursive dynamic: firstly, agency enables individuals to initiate learning; secondly, learning, in turn, can strengthen agency, self-confidence, and autonomy.

Studies support this two-way relationship. Participation in adult education has been shown to enhance self-efficacy and empowerment (de Greef et al., 2012; Hammond & Feinstein, 2005). Yet, as Boyadjieva and Ilieva-Trichkova (2021) argue, these outcomes are not equally realised. Conversion factors at micro, meso, and macro levels shape whether learning outcomes translate into expanded capabilities. Vulnerable adults often benefit less, not because learning is ineffective, but because structural barriers limit the extent to which gains in confidence or autonomy can be converted into meaningful opportunities. Understanding participation and outcomes therefore requires moving beyond narrow employability metrics towards a broader account of social, cultural, and political dimensions: identity, belonging, empowerment, and critical agency. Taken together, these perspectives position human agency not only as a driver of participation but also as a central outcome of adult learning, one unequally realised across social groups and best understood through a capabilities-informed approach.

Still, the concept of agency does not fully explain why some environments support learning transitions while others inhibit them. To examine how social and spatial contexts shape the expression of agency, the next field discusses theories of bounded and situated agency.

Field 3: Theories on agency as bounded and situated: Emphasis on the role of regional contexts

While agency is a central concept in adult learning participation research, scholars increasingly emphasise that it cannot be understood solely as an internal human attribute. Rather, agency is entangled with the environments in which individuals live and act. From this perspective, individuals' capacity to make choices and pursue goals is shaped, though never fully determined, by the social, institutional, and spatial conditions surrounding them. The concept of bounded agency provides a crucial bridge between individual-level explanations and broader contextual analyses of adult learning.

Developed by Evans (2007) and further elaborated by scholars such as Biasin and Evans (2019) and Rubenson and Desjardins (2009), bounded agency conceptualises individuals' intentions, choices, and actions as situated, relational, and historically embedded. Agency is not abstract or universal, but expressed *through* an environment. As Biesta and Tedder (2007, p. 137) succinctly observe, adults exercise agency "by means of an environment rather than simply in an environment." This shifts the analytical focus from individual motivation alone to the opportunities, constraints, and cultural norms that mediate how agency unfolds. The bounds may include the visibility and accessibility of learning opportunities, but also subtler symbolic dimensions: locally shared beliefs about what counts as legitimate learning, who is perceived as a 'learner', and which forms of knowledge are valued within a regional context.

While early applications of bounded agency focused primarily on institutional structures and welfare state regimes (Rubenson & Desjardins, 2009), a growing body of scholarship situates the concept within regional and socio-spatial contexts (Field & Lynch, 2015; Hefler & Studená, 2023; Meyers, 2017; Rutten & Boekema, 2012; Spours, 2024). From this viewpoint, agency is shaped not only by policy frameworks but by the places, networks, and infrastructures through which people live and learn. Regional learning environments, comprising educational institutions, VET providers, libraries, employers, NGOs, community organisations, and public services, function as fields of affordances, offering varying opportunities for action that condition how agency can be enacted.

Research on learning cities and learning regions (Longworth, 2019) conceptualises learning cultures as the shared practices, values, and institutional arrangements that shape how learning is understood and supported within organisations and territories. These learning cultures express the social and spatial embeddedness of adult learning processes (Barnes et al., 2019; Borkowska & Osborne, 2018; Rutten & Boekema, 2012). At the organisational level, this includes the extent to which welfare organisations, libraries, and VET providers create environments that actively support, or inadvertently discourage, participation among vulnerable adults.

Regional differences in learning infrastructures shape how adults perceive their capacity to learn, as agency is exercised through socio-spatial environments rather than independently of them (Biesta & Tedder, 2007; Evans, 2007; Rubenson & Desjardins, 2009; Rutten & Boekema, 2012). In fragmented or weakly coordinated regional systems, learning aspirations may remain latent not because of individual deficit, but because contextual conditions fail to activate or sustain agency (Boeren, 2017; Field & Lynch, 2015). In this way, the boundedness of agency is dynamic, varying geographically and socially according to how regional learning cultures are cultivated.

Research argues that Dutch regional learning systems remain fragmented and insufficiently coordinated (e.g. SER, 2021; Smulders et al., 2019; Thunnissen, 2021). Short-term project-based funding, limited institutional responsibilities, and unclear governance arrangements undermine the development of sustainable regional learning cultures. These weaknesses disproportionately affect the adults least able to navigate complex systems and most dependent on supportive learning infrastructures.

From this perspective, the regional context functions simultaneously as an enabler and boundary of individual agency. Structural features, such as the density of collaboration among organisations, the visibility of learning opportunities, and the inclusiveness of outreach practices, could play a decisive role in determining whether adults experience learning as a realistic, valued, and attainable pathway. Field 3 suggests that agency is enacted within place-based learning cultures that can either expand or restrict individuals' opportunities to learn.

The capability approach: an integrative framework

Taken together, the three fields outlined above provide complementary but partial perspectives for understanding what enables vulnerable adults to engage in learning within regional contexts. Field 1 clarifies why adult learning matters and which personal and societal outcomes are at stake. Field 2 deepens this by examining the motivations, barriers, and multidimensional forms of agency that shape individuals' transitions into learning. Field 3 extends the analysis to the regional environments in which agency is enacted, highlighting how learning cultures, infrastructures, and institutional coordination condition individuals' opportunities to participate. However, while each field offers essential insights, none alone provides a sufficiently holistic framework for analysing how personal aspirations, social structures, and regional affordances interact. This is precisely where the capability approach could offer added value: building further on the three fields, it integrates them by focusing on individuals' *real freedoms* to learn and on the *conversion conditions* that shape those freedoms.

Rooted in the work of Sen (1993, 1999, 2009) and further developed by Nussbaum (2013) and Robeyns (2000, 2005, 2017), the capability approach reframes education not simply as a means to economic ends but as a potential enabler of human development, self-determination, and agency. Applied to adult learning (Boyadjieva & Ilieva-Trichkova, 2021), it suggests that what ultimately matters is not participation alone, but whether individuals *actually* have the opportunity to pursue and benefit from learning they value. Given these characteristics, the capability approach might serve as a suitable theoretical lens for this dissertation, offering a broader and less reductionist view of adult learning than traditional human capital models (Becker, 1964).

The capability approach seems to resonate closely with, and potentially integrate, the insights of the three fields:

1. **Field 1: Why learning matters — valued beings and doings:** Field 1 illustrates the broad range and plurality of valued life outcomes associated with adult learning. From a capability approach perspective, these outcomes can be understood as both capabilities and functionings: learning expands adults' real

opportunities (capabilities) to achieve valued beings and doings, while also supporting the realisation of those outcomes in practice (functionings). Because adults may have reason to value different beings and doings, adult learning cannot be reduced to a pathway to employability alone. Its value should therefore not be assessed solely in terms of employment participation or macro-level productivity and economic growth, but also in terms of how it enhances people's freedom to pursue resilience, well-being, social participation, and broader forms of human flourishing.

2. **Field 2: Agency and motivation — the freedom to value learning:** Field 2 highlights that participation is shaped by agency, self-efficacy, and intrinsic motivation. The capability approach might help conceptualise these as part of individuals' *capability sets*, reflecting the real freedoms they have to choose and pursue learning. This perspective suggests that variations in agency might be understood as variations in capabilities.
3. **Field 3: Regional learning cultures — conversion factors shaping real freedoms:** Field 3 demonstrates how regional environments influence access to learning. In capability terms, these may be seen as *conversion factors*; the social, institutional, and spatial conditions that affect whether resources (e.g. courses, funding, guidance) can be turned into genuine opportunities. This alignment hints at the potential of the capability approach to connect personal agency with contextual conditions.

Taken together, these possible alignments imply that the capability approach could integrate micro-level (individual) and meso-level (regional) processes in a coherent way, although this remains an interpretive choice rather than an inherent feature of the framework.

Within this framework, vulnerability might be understood as arising from personal, social, and structural conditions that reduce individuals' real freedoms to engage in learning (Egdell & Graham, 2017; Robeyns, 2017). Such an interpretation views vulnerability not as a fixed trait but as contingent upon access to supportive environments and conversion conditions. From this perspective, policies aimed at reducing vulnerability

may need to move beyond barrier removal alone and instead consider how capabilities and agency can be strengthened. These interpretations remain open to contestation, but they offer a potentially useful lens for examining learning among adults facing complex challenges.

The capability approach may help draw together the disparate elements identified across the three fields. It appears to offer:

1. **A shift from barriers to freedoms:** Rather than merely identifying obstacles, it invites examination of whether individuals have the freedom to value and pursue learning.
2. **Attention to diversity rather than uniformity:** It highlights that identical resources can affect people differently due to varying conversion factors, which may help explain why vulnerable adults often face triple disadvantages: weaker agency to value learning, fewer enabling environments, and less capacity to reap benefits (Boyadjieva & Ilieva-Trichkova, 2021).
3. **A focus on valued outcomes rather than inputs:** It suggests evaluating adult learning not just by participation rates but by whether learning leads to outcomes individuals consider meaningful.

The capability approach might provide a bridge between individual agency and regional learning cultures. At the micro level, it could help explain how aspirations and self-efficacy interact with personal circumstances. At the meso/regional level, it may support analysis of whether organisational and collaborative arrangements expand or restrict learners' capabilities. At the macro/policy level, it could offer a means to assess how welfare and funding systems shape inequalities in opportunities. While these connections are interpretive rather than prescriptive, they suggest that the capability approach has potential for linking multiple layers of analysis.

Given this interpretive potential, the capability approach might offer a coherent framework for addressing the research questions: The first sub question (Which intrinsic and extrinsic factors enable or hinder vulnerable adults to take up learning?) may be examined through capability concepts of agency, motivation, and personal conversion factors (Fields 1 & 2). The

second sub question (What are the success factors for regional learning infrastructures that enable vulnerable adults to engage in learning?) could be explored through social, institutional, and regional conversion factors (Field 3). Thus, the capability approach may help bring together insights about individual motivations and regional structures under a single, multi-level analytical lens. The capability approach might not provide definitive answers to the main question (What is needed for vulnerable adults to start learning, and which conditions of regional level learning cultures foster such learning?) but could serve as a promising conceptual orientation for exploring the complex interaction between personal agency and contextual learning environments.

Methodological approach

The questions as presented above are linked to two interconnected research tracks, namely an agency track that investigates how vulnerable adults are supported and hindered to learn by their capabilities and conversion factors, and a regional track that examines the conditions under which organisations and regional partnerships foster learning cultures that enable self-directed learning.

Both tracks are supported by a narrative literature review, empirical work and analysis. The literature reviews were designed as narrative literature reviews (Baumeister & Leary, 1997; Hall et al., 2021; Snyder, 2019), aimed at theory development. The empirical work consisted of interviews with adult learners (69) and with organisations supporting adult learners (29). In interviewing the adult learners a deviant case approach was taken (Flyvbjerg, 2006), focusing on those adults that despite a vulnerable position succeeded in starting learning. As interview technique, this study applied an innovative qualitative interview technique known as card-sorting. This technique enables participants to reflect on and prioritise their answers and allows to (re-)structure their own reflections to come to a deeper analysis of what hinders or stimulates learning (individual and in regional structures). This method bridges qualitative depth with the possibility of identifying broader patterns across cases. The interviews were transcribed and subsequently analysed through a combination of qualitative and quantitative techniques. Qualitative coding was conducted in Atlas.ti, while PSPP (an open-source alternative to SPSS) was used to

generate a quantitative mapping of selected factors, with Excel employed for the visualisation of resulting patterns. For interpretation of the interview findings, a mix of thematic analysis (Braun & Clarke, 2006) and grounded theory analysis (Glaser et al., 1968) was applied. This allowed analyses on how interviewees applied concepts from the pre-developed theory resulting from the narrative literature reviews.

The findings of both tracks feed directly into the final analysis as presented in the concluding chapter of this dissertation, which integrates insights from both tracks to answer the main research question about how can regional actors succeed in building learning cultures that foster self-directed learning by vulnerable groups of adults.

Structure of the dissertation

This dissertation is organised into seven chapters, each addressing a specific aspect of the overarching question of how vulnerable adults can be supported to engage in learning and how regional learning cultures can foster such engagement.

Chapter 2 focuses on individual agency in adult learning from a theoretical perspective. It presents a narrative literature review on adult learning, motivation and participation, synthesising insights from psychological, sociological and andragogical research. Drawing in particular on the notion of bounded agency and the capability approach, the chapter develops a conceptual model that explains how intrinsic and extrinsic factors shape adults' capacity to intentionally engage in organised and structured learning activities aimed at sustaining or improving their economic, social and personal well-being.

Building on this conceptual groundwork, Chapter 3 empirically examines how vulnerable adults experience and navigate learning over the life course. Based on 69 in-depth interviews using a card-sorting approach, the chapter analyses learning biographies to explore how personal characteristics, social relations and institutional conditions interact in enabling or constraining transitions into learning. The findings shed light on the dynamic interplay between motivations, barriers and contextual factors in shaping learning trajectories.

Chapter 4 shifts the focus from individuals to the regional context in which learning takes place. It presents a literature review on socio-spatial learning environments and learning regions, examining how meso-level conditions—such as organisational density, collaboration, governance and cultural norms—can activate or inhibit learning among vulnerable adults. This chapter conceptualises regions as conversion environments that condition how individual resources and aspirations are translated into actual learning opportunities.

Chapter 5 provides an empirical exploration of these regional dynamics through case studies in three Dutch labour market regions. Drawing on data from 29 organisations, including vocational education and training institutions, libraries, welfare organisations, employment services and community associations, the chapter analyses how organisational practices, partnerships and governance arrangements contribute to, or hinder, the development of inclusive regional learning cultures. Particular attention is paid to inter-organisational cooperation and the ways in which regional infrastructures support or fail to support vulnerable adults.

Chapter 6 takes a methodological perspective by reflecting on the use of card-sorting as a research method. Based on the experiences gained from the interviews with vulnerable adult learners, the chapter critically discusses how card-sorting can help uncover the interplay between motivations and barriers to learning. It evaluates the strengths and limitations of the method and reflects on its potential for future research with groups who may find conventional interview techniques less accessible.

Finally, Chapter 7 brings the findings of the preceding chapters together. The concluding chapter synthesises insights from both the individual and regional levels, confronts them with existing theories, and answers the overarching research question. It discusses the implications of the findings for theory development, policy design and educational practice, with particular emphasis on how agency and regional learning cultures can be strengthened to foster lifelong learning among vulnerable adults.

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Chapter 2: What makes adults choose to learn: Factors that stimulate or prevent adults from learning

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Abstract

Adult learning policies need to be based on an understanding of the inequalities in the uptake and benefits of learning and why adults might not participate. This needs to go beyond a mere insight in barriers that, once removed, do no longer provide a reason for adults not to participate. This article aims to delph deeper in understanding what makes adults choose to learn. It starts by applying a capability approach perspective to adult learning to evaluate whether adults have freedom to value learning and, whether they can effectively turn this freedom into learning. This conceptual framing puts certain concepts in the spotlight, namely ‘agency’, ‘conversion factors’ and ‘benefits of learning’, which were further explored through a narrative literature review analysing 109 articles. This resulted in an exploration of these concepts and their interplay feeding into a conceptual model, opening new perspectives for evaluating whether adults have equal opportunities to value adult learning and turn their willingness into actual learning. This model supports future empirical studies aimed to understand participation and non-participation of adults in learning that can in turn feed policy makers with better insights and tools to develop interventions actually provide the right encouragements for adults to learn.

Key words

Adult learning, capability approach, agency, conversion, benefits of adult learning, aspirations to learn

Introduction

To design and develop policies and programmes that respond to adult learners' needs, it is essential to understand the dynamics that underlie adults' participation and non-participation in learning. If not fully captured, policies and programmes are not able to engage those adults that need learning the most. Evaluations and studies on adult learning policies consistently report that specifically disadvantaged adult learners can hardly be re-engaged in learning, despite tailoring the approach to solving group-specific barriers. For instance, the Swedish Adult Education Initiative from 1997 to 2002 (Rubenson, 2001) educated half a million adults, but did not change the pattern of non-participation among the group of the most difficult to reach adults (Antikainen, 2005). As a result of not addressing effectively persistent non-participation of specific groups of vulnerable adults, adult learning is increasingly perceived as widening differences in opportunities instead of bridging them (Kocór & Worek, 2017), pointing to the often referred Matthew effect of cumulative advantage and cumulative disadvantage (Boeren, 2009, 2017; Marcaletti et al., 2018). To prevent these negative effects of adult learning from occurring, and for developing evidence-based and effective policies, it is essential to improve our understanding what stimulates or prevents adults to learn.

The non-participation of adults in learning is primarily analysed in terms of the existence of barriers (see for instance: Cross, 1981; Roosmaa & Saar, 2017). This analysis concentrating on barriers presupposes that all adults have a natural desire to learn and that if barriers are removed, all adults are provided with equal opportunities to engage in learning and development (Ahl, 2006). Barriers are perceived as impeding individuals that want to engage in learning because they realise they will fall behind their competitors if they do not learn (Regmi, 2015). In terms of policies, this results in putting more responsibility for success and failure on the individual (Boydjjeva & Ilieva-Trichkova, 2021). This results in the policy-theory which states that when policies remove barriers to participation, and lower thresholds to participation, individuals will decide learning is good for them and participate in adult learning programmes. By this barriers-related paradigm, governments can argue that policies provide everyone with the same opportunities to participate but some individuals simply choose not

to do so. Hence, in this paradigm, there is no need for additional policy action as individuals make a deliberate choice not to learn.

To avoid this, and support design of better policies and programmes, wider structural barriers need to be taken into account explaining inequalities in the uptake of learning and how people may benefit from learning (Eynon & Malmberg, 2021). Therefore, this article, proposes an alternative perspective to analyse non-participation in learning compared to the approach that presupposes that adults have a natural desire to learn that will emerge if barriers are removed. This alternative perspective is based on the capability approach as promoted by Sen (1993, 2009a). The capability approach provides a framework to evaluate social phenomena. At a micro, individual level, the capability approach asks what people are able to do and what person they are able to be. At a macro, policy, level, the capability approach asks whether the institutions, practices and policies focus on people's capabilities (their opportunities to do what they value) and to what extent they offer equal opportunities. The capability approach aspires to look beyond the effect of social policies in terms of participation, and explores the black box on how policies play out for different people, increasing their capabilities in terms of freedom of what they choose as valuable to achieve. The actual possibilities (or capabilities) instead of outcomes (achievements) are the lens through which policies are designed and evaluated (Lewis & Giullari, 2005). The capability approach provides a framework to evaluate social policies looking at how they enable individuals to turn available resources into capabilities and achievements they choose to value (Robeyns, 2005).

The capability approach is widely applied to evaluate various social phenomena. It is, however, not so widely applied to evaluate adult learning. While the role of education for welfare development is discussed in the capability approach, usually, 'education' is seen as a capability that allows different individuals to pursue beings and doings that they see as valuable (Nussbaum, 2013; see discussion in: Unterhalter, 2003). In addition, Lanzi sees education from the development perspective, defining its value "by the sum of instrumental values (wages, test scores, certificates, etc. ...), intrinsic values (achievements in agency, autonomy and well-being) and positional values (established social relations, access to positional goods,

etc. ...) (Lanzi, 2007, pp. 425–426). Hence, the capability approach is in earlier research applied more at a system level and less so on understanding and evaluating individual freedoms to choose education, something that is essential for understanding adults' participation in adult learning, as this is more subject to individual choice than participation of young people in initial education.

From this perspective, this article focuses on the question: what makes adults choose to learn? Alternatively, to formulate the question more precisely: what makes adults intentionally engage in organised and structured learning or development activities that aim to sustain or improve their existing situation (economically, socially and individually well-being)? Further conceptualising our research question in a capability approach suggests that we should not look at participation in learning alone or lowering specific barriers as the measures for a successful, and equitable adult learning system. Through answering this question, and exploring factors stimulating and hampering learning, this article may provide input for a conceptual model that is further developed through future empirical studies providing a better base for policy development in adult learning understanding how policy initiatives can better stimulate adults to learn.

While in principle all forms of adult learning is subject to our question, irrespective of its form (i.e. formal, non-formal, informal), or purpose (for leisure, work or personal development), to understand better the choice aspect, in this article the focus is on learning for which the adults make a choice to engage with. Hence, the learning we focus on here is intentional from the learner's perspective, organised and structured, for instance in a formal or non-formal setting (Boeren, 2017; Cedefop, 2014). In the Dutch context, adult learning is conceptualised as lifelong development (Ministerie van Sociale Zaken en Werkgelegenheid, 2020), being “[t]hroughout life, the (pro)active development of qualities based on motives and possibilities for a sustainable contribution to society, one's own work environment, health and happiness, for now and for the future” (translation authors) (Kuijpers et al., 2019; Kuijpers & Draaisma, 2020, p. 1). Learning as development conceptually points to that any learning should result in some form of change or application of what is learned, in whatever form.

Theoretical framework: a capability approach perspective to adult learning

Within the capability approach, there are a number of key notions that are relevant for conceptually exploring adults relations to learning. These concern functionings and capabilities, human agency, and conversion factors. The capability approach looks at what people *can* do (capabilities) rather than what they actually do (functionings), together with substantive freedom of choice, taking into account external factors and personal characteristics (Egdell & Graham, 2017; Sen, 2009b). This distinction between functionings and capabilities is a key notion in the capability approach allowing assessing whether people have the freedom to do the things that person has reason to value (Robeyns, 2017; Sen, 2009a). Another key underlying notion, besides the notions of capabilities and functionings, and in fact the starting point for the capability approach is the notion of human agency (Sen, 1993), seeing individuals as autonomous persons who should be able to decide what they wish to achieve based on their own understanding of a 'good life' rather than one imposed upon them (Egdell & Graham, 2017). In the end, individuals make choices from their capability set and transfer resources into achievements they choose to value. But even before that, people can have aspirations as capabilities whereby only some might turn into 'real' aspirations (functionings), because they are indeed considered valuable to be pursued. As clearly expressed by Hart (2016, p. 336) "The kinds of aspirations we have influence the kinds of capabilities for which we strive." A final key notion is that of conversion factors. Persons have all kind of abilities to convert resources into functionings. These abilities are referred to as conversion factors: the factors which determine the degree to which a person can transform a resource into a functioning (Robeyns, 2017; Sen, 1992). A resource, or commodity, might be a material object (for instance a bicycle); a person might have the ability to turn this resource into the functioning (in our example of a bicycle, to be mobile); the conversion factor is the extent to which this person is indeed able to do so (in our example, someone that learned how to ride a bicycle has a high conversion factor whereas a person that never learned how to ride a bicycle has a low conversion factor)

(Robeyns, 2017). Conversion factors influence how a person can be or is free to convert the characteristics of the resources into a functioning.

From this capability approach perspective, asking the question what makes adults intentionally act towards engaging in organised and structured learning or development activities, requires us to consider whether adults find adult learning a valuable thing to do and if so, whether they have the resources and opportunities to turn this capability into actual learning. It concerns how individuals can use resources (or commodities) to enhance their 'capability set', or combinations of potential functionings, choose what they find valuable to achieve as functionings and actually whether they have the abilities to achieve those functionings. The focus is on the capability set, the choice of what that person find valuable rather than the resources that person has access to (Walker, 2005). Positioning adult learning in a capability approach perspective leads therefore to further exploring a number of interrelated concepts and questions:

- Firstly, do individuals have adult learning as a capability within their wider capability set and do they have a possibility to choose adult learning as a valuable life choice? This relates to whether individuals can be expected to have aspirations towards adult learning and whether individuals are provided with equal opportunities to value adult learning. This is closely linked to whether individuals perform *agency* towards adult learning.
- Secondly, do individuals have the abilities and support to convert resources into the actual adult learning (summarised as 'conversion ability')? Here, the conversion factors that relate to adult learning need to be further explored.
- Lastly, do individuals have equal opportunities to benefit from adult learning participation? Does adult learning and lifelong development lead to the same outcomes and results for individuals?

Hence, we need to investigate the underlying dynamics and structures that either stimulate or prevent a person to aspire learning and under which conditions that person is able to convert this aspiration in actual learning. Reflecting from a capability approach perspective on the question 'what

makes adults act towards engaging in learning’ brought us to consider the interplay between agency and the context in which an individual is situated and the results and benefits that a person yields from engagement with learning.

Conceptually framing the research question from a capability approach perspective (most notably: Boyadjieva & Ilieva-Trichkova, 2021; Egdell & Graham, 2017; Lanzi, 2007; Robeyns, 2017; Sen, 1993, 2009b; Unterhalter, 2003), identified specific key concepts, namely ‘agency’, ‘conversion factors’ and ‘benefits and results of learning’. These concepts need a further conceptual exploration, which is conducted through a narrative literature review.

Method

A narrative literature review aims at theory development, proposing a novel conceptualisation or theory regarding a specific phenomenon covering diverse disciplines (Baumeister & Leary, 1997; Hall et al., 2021; Snyder, 2019). The literature is explored through an article title search in Web of Science using combinations of search terms related to adult, educat*, learn*, empower*, agenc*, self-efficac*, motivation, autonom*, aspirations, activation, self-directedness, self-determination, empowerment, conversion, capital, welfare, barrier*, capability*. In total 459 articles were identified. When analysing the articles and coding them in Atlas TI, in the end 109 articles were identified containing codes related to capability approach, agency, conversion factors, and benefits and results. Articles that were not considered relevant mostly concerned articles in which ‘agency’ referred to institutions, articles that specifically focused on certain types of adult learning delivery (for instance online and blended learning, higher education), articles that focused on learning in a specific context (for instance linked to medical professions), and finally, articles that focused more on initial education and young people instead of adults.

The articles cover both single concepts and a combination of concepts. Of the 109 articles, 54 covered only one of the concepts, 37 covered two, 15 covered three and only three articles covered all concepts (Boyadjieva & Ilieva-Trichkova, 2018; Field & Lynch, 2015; Rubenson & Desjardins, 2009). The following table provides a summative overview of the identified articles

and the coverage of the key concepts by indicating how many articles (and the share of the total number of articles) covered the key concepts (end of the row) and how many articles covered two different key concepts. What can be seen is that agency and conversion factors are the most occurring combination of two concepts in the 109 articles (identified in 36% of the articles). Furthermore, in terms of combinations of three concepts, twelve articles (11%) covered the combination of agency, conversion factors and benefits and results (Alkire, 2005; Allmendinger et al., 2011; Booker et al., 2021; Boyadjieva & Ilieva-Trichkova, 2018; Evans et al., 2013; Eynon & Malmberg, 2021; Field & Lynch, 2015; Hachem, 2022; Hammond & Feinstein, 2005; Leung & Liu, 2011; Rubenson & Desjardins, 2009; Yamashita et al., 2022). The outcomes of the analysis of all identified articles is presented in the following sections.

Table 1

Coverage of concepts by articles included in the narrative literature review (N=109)

	Combinations of two concepts				Combinations of three concepts				Covering all concepts
	Benefits and results	Conversion factors	Agency	Capability approach	1	2	3		
Capability approach	6	10	11	21	Capability approach	Agency	Conversion factors	7	3
	6%	9%	10%	19%				6%	3%
Agency	18	39	84		Agency	Conversion factors	Benefits and results	12	
	17%	36%	77%					11%	
Conversion factors	16	54			Capability approach	Conversion factors	Benefits and results	3	
	15%	50%						3%	
Benefits and results	26				Capability approach	Agency	Benefits and results	5	
	24%							5%	

The concept of ‘agency’

In the capability approach, human agency is associated with a person’s ability to turn resources into functionings. As indicated earlier, human agency forms the starting point for the capability approach. There are however also other approaches to the concept of human agency. The narrative literature review, linked to adult learning identified eleven articles that conceptually discuss ‘agency’ in a capability approach perspective among the 84 articles that discussed ‘agency’. In the following sections social-cognitive, socio-psychological, and sociological perspectives on agency are discussed to identify aspects that can be taken on board in a further conceptualisation of agency related to adult learning.

A social-cognitive perspective on agency

From a social-cognitive theory perspective (Chen, 2006), Bandura defined human agency as “a combination of human capacity and potential that assists a person to exercise some control over the nature and quality of his or her own life, including aspects such as forethought, self-regulation of motivation, affect, and action through self-influence, self-awareness, meaning, and purpose in life. As these agentic variables interact and interplay as a whole, they shape one’s direction in life and its associated course of action” (Bandura, 2001; Chen, 2006, p. 131). The core belief in one’s own self-efficacy is the foundation of human motivation, performance accomplishments, and emotional well-being (Bandura, 2010). Individuals with low self-efficacy tend to back away from daunting tasks as they often see these tasks as threats. Furthermore, they set lower targets and have a weak commitment to their set goals and focus more on self-doubts, their deficiencies, the consequences of the failure, and give up rather than considering ways to overcome challenges. Individuals with higher levels self-efficacy levels often do the opposite (Bandura, 2010; Calaguas & Consunji, 2022).

This social-cognitive approach emphasises the role of individuals as intentionally influencing their life circumstances and being self-organising, proactive, self-regulating, and self-reflecting (Brady & Gilligan, 2020). This approach to human agency emphasises the person’s internal determinants (beliefs of self-efficacy), but places these in an external environment where the person’s choices and behaviour lead to confirmation, boosting again a person’s self-efficacy beliefs (Alkire, 2005; Bandura, 2001). Closely related to self-efficacy concepts is the concept of ‘locus of control’ which can be described as “a generalized attitude, belief, or expectancy regarding the nature of the causal relationship between one’s own behaviour and its consequences” (Cobb-Clark, 2015, p. 1; Rotter, 1966, p. 2). Both the self-efficacy and the locus of control concepts refer in their own way to perceived behavioural control (Ajzen, 2002), while the locus of control concept adds to the self-efficacy concept the perceived internal and external control related to outcomes (Cobb-Clark, 2015; Kormanik & Rocco, 2009). The social-cognitive perspective on agency, is primarily oriented to the internal control of a person and emphasises less the social embeddedness as condition for agency.

A socio-psychological perspective on agency

A more psychologically oriented theoretical perspective on human agency, that situates individual agency in a social context, is the self-determination theory (Ryan & Deci, 2000). This theory was developed against the background of the question why some people act, and others don't and looks at conditions that foster versus undermine positive human potentials. Understanding the causes of human behaviour supports us in designing social environments that optimise people's "development, performance, and well-being" (Ryan & Deci, 2000, p. 68). The theory sees a person (self) in interaction with the environment and in this interaction, the self is constantly evolving and forming an inner and consistent representation of the self (Kellenberg et al., 2017, p. 24). The self-determination theory, through an empirical, psychological, inductive approach, identifies needs that form the basis for self-motivation, growth, constructive social development and personal well-being. Self-determination consists of a continuum running from a state of amotivational (lacking any intention to act), to extrinsic motivational states (which combine external and internal regulatory processes), to finally an intrinsic motivational state. "Amotivation results from not valuing an activity, not feeling competent to do it, or not expecting it to yield a desired outcome" (Ryan & Deci, 2000, p. 72). To be placed in a more motivational (either extrinsic or intrinsic) state can be supported firstly, through seeing behaviours of significant others to whom a person feels (or wants to feel) attached or related (*relatedness*), secondly, through being presented tasks at the right competence level (*competent*), and thirdly, through feeling autonomous in that the person is doing the task on its own (*autonomy*).

The self-determination theory describes an autonomous person as "his or her behaviour is experienced as willingly enacted and when he or she fully endorses the actions in which he or she is engaged and/or the values expressed by them. People are therefore most autonomous when they act in accord with their authentic interests or integrated values and desires" (Alkire, 2005, p. 242). Alkire argues that this concept of autonomy comes close to Sen's concept of agency, "because it focuses on capabilities that the person values (in contrast to self-efficacy, which identifies capabilities a person understands herself to have – whether or not she values them)" (Alkire, 2005, p. 242). The basic psychological needs, competence,

relatedness, and autonomy “must be satisfied across the lifespan for an individual to experience an ongoing sense of integrity and well-being or ‘eudaimonia’” (Ryan & Deci, 2000, p. 75). In the end, having ownership of your decisions, feeling empowered contributes to overall well-being.

The self-determination theory offers support to design social environments that support the internalisation of motivation. It is therefore a useful theory to apply in the design of adult learning programmes (Kellenberg et al., 2017) and guidance approaches. The self-determination theory is associated with the classical concept of andragogy, emphasising self-directed and intrinsically motivated learning (Knowles, 1984; Wehmeyer et al., 2018). The self-determination theory reveals psychological and social conditions that explain why an agent in a vulnerable position, against the odds, might act and start learning. An agent in a favourable position, having all sociological conditions in place, might not act on the other hand, and refrain from learning.

A sociological perspective on agency

Other agency-perspectives, while positioning agency in wider social contexts, also emphasise the boundedness of agency. In Evans’ concept of bounded agency, actors have a past and imagined future possibilities, “which guide and shape actions in the present, together with subjective perceptions of the structures they have to negotiate, the social landscapes that affect how they act. Bounded agency is socially situated agency, influenced but not determined by environments and emphasizing internalized frames of reference as well as external actions” (Evans, 2007, p. 93). Agencies can differ in their power to act, and this is also influenced by the environment the agent is in. In fact, “(a)gency in adult life operates through engagements in and through the social world; it is exercised through the environments and institutional practices of everyday life in changing social landscapes” (Biasin & Evans, 2019, p. 49). With this concept of bounded agency, Evans is close to wider agency accounts, ‘bounding’ agency through a life course perspective (Biesta & Tedder, 2007; Emirbayer & Mische, 1998). The bounded agency model points to the idea that agency is not absolute: it is bounded by welfare state regimes, agents’ past and imaginary futures, social environment and the accompanying options on which an individual could act.

While reference is made to the capability approach to deepen the interaction of the individual to its context, the bounded agency models make a strong case to situate the individual agency in a wider socially constructed context that determines the potential decisions to take and the structures available to allow individuals to overcome barriers (Radovan, 2012). Therefore, as suggested by the bounded agency models, participation in learning is not as voluntary an act for a person to choose, as it is often regarded, but the “agency to freely choose to participate could be bound by structural conditions.” (Tikkanen & Nissinen, 2018, p. 617). In this sense, when comparing a person in a vulnerable position with someone in an advantageous position towards learning, even within the same welfare state regime, the agency of the vulnerable person is confined firstly by a less favourable past, secondly, by less favourable present circumstances, and thirdly, by an imaginary future that shows less opportunities that the person feels applicable to its situation. Surmounting these unfavourable conditions and starting to learn would mean taking risks that are incomparable to what a person in a favourable position would have to take.

Agency revisited

Ultimately, a person’s agency (self-determination) is determined by relatedness, competence, and autonomy or, when referring to self-efficacy, by intentionality, forethought, self-reactiveness, and self-reflectiveness. All these aspects, however, are the result of the situatedness and boundedness of the agent in question: whether an agent is self-determined, or has self-efficacy towards learning depends on the social context (namely, having significant others that paved the way towards learning or seeing self-efficacy beliefs confirmed by external determinants); their own competence to learn (namely, prior experiences) and the possessed autonomy (namely, seeing learning as something valuable). Approached from a capability approach perspective, agency is in all theories linked to a wider social context. The wider context can refer to ‘relatedness’ (Ryan & Deci, 2000) or some form of ‘boundedness’ (Boeren, 2017; Evans, 2007; Rubenson & Desjardins, 2009). When combining the sociological and social-cognitive approaches to human agency, the following aspects are closely linked to individual agency, in the sense that these aspects explain why a person is in a position to act or not:

- **Aspiration and forethought:** This relates to the extent to which an individual is able to set future goals, develops aspirations about well-being and acts anticipating on future events and (changing) circumstances. In the literature, this aspect is well covered in the self-efficacy literature, motivation literature and literature on aspirations (Alkire, 2005; Bandura, 2001; Hammond & Feinstein, 2005; Hart, 2016; Ibrahim & Alkire, 2007). As argued by Hart (2016), aspirations are future-oriented, driven by conscious and unconscious motivations and they are indicative of an individual commitment towards a particular trajectory or end point. Bandura includes the concept of intention, being a representation of a future course of action to be performed (Bandura, 2001)
- **Competency and confidence (autonomy):** To be able to act relies on having competences and having confidence in using them. This comes close to the intrinsic motivation concept in the self-determination theory looking at autonomy and competence (Ryan & Deci, 2000). It also links to the Bandura's aspect of 'self-reactiveness (self-regulation)' being the property where intentions are converted into actions (Bandura, 2001; Boomkens et al., 2019).
- **Reflectiveness:** Being an agent also relates to being able to reflect on own actions, take ownership of your acts and act intentional. These aspects are all covered in the self-efficacy theory (self-reflectiveness) (Bandura, 2001). "Through reflective self-consciousness, people evaluate their motivation, values, and the meaning of their life pursuits. It is at this higher level of self-reflectiveness that individuals address conflicts in motivational inducements and choose to act in favor of one over another" (Bandura, 2001, p. 10).

The concept of 'conversion factors'

As indicated earlier, 'conversion factors' are a key notion in the capability approach. Persons have all kind of abilities to convert resources, commodities, or inputs for capabilities (Hvinden & Halvorsen, 2018), into functionings (in other words, achieved beings and doings). These abilities

are referred to as conversion factors (Robeyns, 2000): the factors which determine the degree to which a person can convert or transform a resource into a functioning. Conversion factors influence how a person can be or is free to convert the characteristics of the resources into a functioning. Linked to adult learning, the narrative literature review identified 54 articles that discuss conversion factors and associated concepts. Only ten articles explicitly elaborated on conversion factors from a capability approach perspective.

There are different ways conversion factors can be clustered. Sen proposed five factors: personal heterogeneities, distributions within the family, differences in relational positioning, varieties in social climate, and environmental diversities (Hvinden & Halvorsen, 2018; Sen, 2009b). Robeyns (2017) clusters them in three broad groups. Firstly, personal conversion factors relate to a person's personal (physical/mental) abilities, knowledge, skills and competences. Secondly, social conversion factors stem from the society in which a person lives and relates to the social policies, social norms, practices and hierarchies. Thirdly, environmental conversion factors include physical or built environment in which a person lives. Other scholars provide a more nuanced set of conversion factors, specifically developed to analyse youth unemployment and job insecurity transitions amongst young adults, namely: (1) institutional, (2) social, (3) familial, (4) economic, (5) cultural, (6) political and (7) personal (Bøhler, 2019). Taking Bøhler's categorisation as basis and including suggestions from other authors leads to the following set of conversion factors that are applicable to the topic of adult learning:

- **Institutional conversion factors** (Boeren et al., 2012; Bøhler, 2019): these address the impact of institutions on a person's sense of capability. This concerns the ways in which schools, unemployment agency offices or sport clubs might alter a person's ability to live a life according to his or her visions and values.
- **Social conversion factors** (Allmendinger et al., 2011; Bøhler, 2019; Field & Lynch, 2015): these concern the influence of friends, friend groups or social networks on personal capability.

- **Familial conversion factors** (Allmendinger et al., 2011; Boeren et al., 2012; Bøhler, 2019; Chu, 2010; Field & Lynch, 2015): these associate capability with relations within the family.
- **Economic conversion factors** (Allmendinger et al., 2011; Bøhler, 2019; Tikkanen & Nissinen, 2018): these address an individual's income and wealth in relation to capability.
- **Cultural conversion factors** (Allmendinger et al., 2011; Bøhler, 2019): these capture capability's relationships to cultural norms, practices and customs.
- **Political conversion factors** (Bøhler, 2019; Field & Lynch, 2015): these designate how larger changes in the politics or economy of a nation impact on a person's possibilities for capability.
- **Personal conversion factors** (Bøhler, 2019; Hart, 2016; Tikkanen & Nissinen, 2018): these address how the active agency of an individual might improve his or her capability, including choices about voluntary versus paid work in relation to an individual's well-being and/or human capital.
- **Employment conversion factors** (Boeren et al., 2012; Tikkanen & Nissinen, 2018 In addition to the list of Bøhler): these capture work-related factors (job position, company size, working time, work autonomy, sector, skills use at work, skills mismatch, qualifications mismatch).

In addition to those, **life events** or disjunctures that trigger participation in learning of (older) learners are identified in different studies (Feinstein & Hammond, 2004; Hachem, 2022; Jarvis, 2012). These can also be interpreted as conversion factors turning capabilities into functionings. These life events for instance include retirement, illness, loss of spouse, empty nest, leaving caregiving tasks, or becoming (financially) independent. Life events can also be described in terms of 'activating event', triggering new attitudes and motivations to learn (Biasin & Evans, 2019; Jarvis, 2012).

The concept of ‘benefits and results’

Linked to adult learning, the narrative literature review identified 26 articles that discuss benefits and results of adult learning. Only six articles explicitly elaborated on benefits and results from a capability approach perspective.

Besides someone’s agentic power and ability to convert capabilities into functionings (actual learning), another key factor for a successful and equitable adult learning system is that learning and development lead to some form of improvement and benefits, which can also be phrased as preventing negative consequences of not learning. If taking benefits of learning by individuals is not assured, the learning might easily lead to deception and non-continuation of learning. Adult learning is associated with three functions, each having associated benefits of learning; being firstly, economic progress and development (linked to human capital), secondly, personal development and fulfilment (linked to identity capital), and thirdly, social inclusiveness and democratic activity (social capital) (Aspin & Chapman, 2000; Cocquyt et al., 2019; Schuller et al., 2004). Regarding the outcomes, benefits and results of (adult) learning, many (empirical) studies and literature reviews have been conducted and a wide range of potential benefits are referred to (Allmendinger et al., 2011; Balatti & Falk, 2002; Leung & Liu, 2011; Ruhose et al., 2019; Schuller et al., 2004; Yamashita et al., 2022). Based on these studies, the following list of benefits and outcomes of adult learning and development can be provided:

- **Economic position and progress** (Allmendinger et al., 2011; Balatti & Falk, 2002; Schuller & Desjardins, 2010): this relates to employment and quality of working life (e.g. finding paid employment), improved job security, job mobility, increased wages and reduced unemployment risks, increased job prestige, progression in career.
- **Personal development and fulfilment** (linked to identity capital) (Feinstein & Hammond, 2004; Hammond & Feinstein, 2005; Leung & Liu, 2011; Schuller & Desjardins, 2010): this relates to gained skills, gained competences, gained qualifications, gained opportunities to further learning and development, gained agency (aspirations, competency,

confidence, reflectiveness), increased autonomy and self-efficacy, but also personal safety (e.g. decreasing crime activity, applying conflict resolution) (Balatti & Falk, 2002).

- **Social inclusiveness and democratic activity** (social capital) (Leung & Liu, 2011; Ruhose et al., 2019; Schuller & Desjardins, 2010): this relates to improved social support, familiar support, increased participation in society, reduced crime activity, increased cultural capital and increased social capital such as membership in civic groups, political interest, voting, social networks, and trust.
- **Overall well-being and health** (Balatti & Falk, 2002; Feinstein & Hammond, 2004; Leung & Liu, 2011; Schuller & Desjardins, 2010): this relates to improved physical well-being, mental well-being, happiness, better health, life satisfaction.
- **Education and training** (Balatti & Falk, 2002): this relates to obtained skills, competences, qualifications, acquiring credentials, progression in learning, access to courses, and an increased interest in learning.

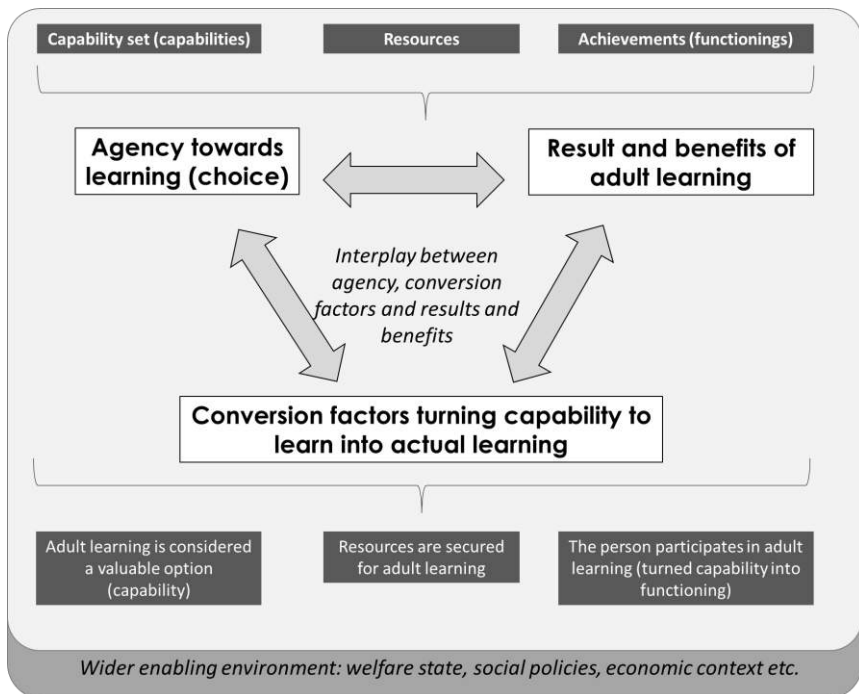
Connecting agency, conversion factors and ‘benefits and results’

The interplay between agency, conversion factors and outcomes of adult learning can be positioned in a wider social context. From the theoretical explorations it becomes clear that the social context and environment function as enablers for an agent to convert a desire, through using resources, into learning. The social context and environment determine the likelihood an agent values learning and impact the conversion power of an individual. Without entering too deeply in a much debated topic on structure and agency, there is a clear dependency between an individual’s choices and the social structure the individual belongs to (Hitlin & Elder, 2007). This social structure, context and environment might not completely determine a persons actions, but they do inform them. Hence, while certain persons are confronted with a disadvantaged proposition to learn, answers on how to increase their chances to engage in learning can probably be found in the direct social structure, context and environment. This conducive environment for developing and exploiting agency towards

learning is a concept that might both influence the agentic ability and the conversion ability, and hence the actual participation in, and outcomes of adult learning. The concept of environment recognises that individual's actions are always embedded in a larger context in which that context both determines the individual's choices and in which the individual's choices in turn determine the context. This concept is hence situated in a wide sociological discussion on 'structure and agency', while avoiding social determinism (Archer, 2003). Figure 1 summarises the conceptual explorations of agency, conversion and benefits of adult learning based on the capability approach and positioned in a wider social context and environment.

Figure 1.

A capability approach-model depicting the interplay between agency, conversion factors and results and benefits of adult learning to explore what stimulates or prevents an adult to learn



Note: Developed by authors

Each of the three concepts discussed (agency, conversion, benefit) can be both the precondition and the outcome of the other as illustrated in Figure 1. Individual agency is both a condition to take action towards learning, but learning in itself impacts the agency of the learner (Hammond & Feinstein, 2005; Rubenson & Desjardins, 2009). First, perceptions of achievement in adult education increase self-efficacy. Secondly, adult education leads to more challenging occupations, which build self-efficacy. Thirdly, resistance to participation in adult education is reduced as self-efficacy increases. Finally, learning on the job can build self-efficacy, and although participation in employer-provided training courses does not appear to play an important role, it reflects engagement in occupations where the value of learning is recognised (Hammond & Feinstein, 2005). In addition, learning taking place in social groups, affects socialisation and agency through feeling related to others (Ryan & Deci, 2000). Increased self-efficacy and agency is in turn also related to higher levels of well-being (Ryff & Keyes, 1995). The outcomes of adult learning hence also refer back to agency-enhancement and support adults, in terms of the capability approach, to expand their perspectives on the life they choose to value. When adults participate in learning, they feel more supported to review what they value in life and this brings benefits beyond individual well-being and economy and a narrow idea concerning the 'return on investment' (Allmendinger et al., 2011; Boyadjieva & Ilieva-Trichkova, 2018). Hence, agency as key outcome of adult learning drives also reaching other societal and economic outcomes. The concepts of agency and conversion factors have a similar relationship (being both a precondition and outcome). Some authors position agency as a result of a combination of conversion factors (Robeyns, 2000), some see a more fundamental role of individual agency (Bandura, 2001; Meyers, 2017), and others see that conversion factors and agency are in a continuous interplay (Evans, 2007; Hart, 2016). Agency is shaped in different ways by the conversion factors. Firstly, the conversion factors influence the set of capabilities from which a person can freely choose to value one. Secondly, these conversion factors influence whether this person can realistically turn the capability into a functioning (Hvinden & Halvorsen, 2018)). Ultimately, given availability of resources, agency, conversion factors and outcomes of adult learning together determine the likelihood that adults can benefit from adult learning.

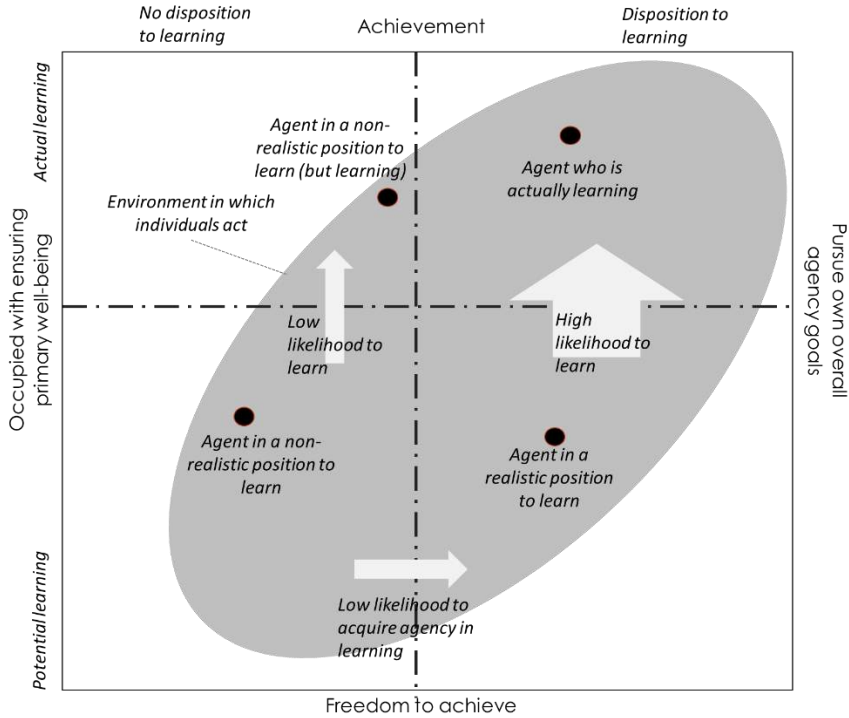
Discussion: towards an evaluative approach for adult learning

The capability approach allowed to apply a more elaborate conceptual approach to evaluate what factors stimulate or prevents adults to learn. It is not enough to only look at participation or non-participation in adult learning to understanding inequalities related to adult learning. It is also not enough to only look at barriers for adult learning to understand why certain adults find it difficult to engage in adult learning. The capability approach on the other hand opened perspectives to look at whether adults are at all in the position to learn, whether they have the freedom to choose adult learning as a valuable capability, and whether they have the abilities to turn resources into actual learning. This conceptual model can be used to evaluate whether adults have equal opportunities to value adult learning and turn their willingness into actual learning.

For evaluating an individual's situation related to any social topic, Sen (1993) argues that we need to look at two dimensions. Firstly, the evaluation looks at whether the person has freedom to achieve what that person values (capabilities) or actually achieved what that person values (functionings). Secondly, the evaluation looks at whether the person is primarily engaged with ensuring the own well-being (health, living conditions) or whether the person can pursue its overall agency goals, in other words, those goals that a person has reason to value (Anand & van Hees, 2006; Sen, 1993). Together these two distinctions constitute four clusters in which people's state can be evaluated. Figure 2 uses Sen's two dimensions and applies them to adult learning. Through this, the figure summarises the conceptual explorations and indicates how the different groups of adults connect to adult learning.

Figure 2.

Agency, conversion and actual participation in learning: Four groups of adults and their relationship with learning



Note: Developed by authors. The two dimensions are extracted from texts from Sen (1993), Anand & van Hees (2006), and Gangas (2016).

Related to this, four groups of adults can be identified, namely:

- **Adults in a non-realistic position to learn:** this concerns persons who are pre-occupied with securing primary well-being and are not in the position to project a future in which learning plays a role. In addition, the context (social, economic etc.) does not support any conversion of resources into actual learning.
- **Adults in a realistic position to learn, who do not (yet) participate in learning:** this concerns persons who have achieved primary well-being and see the value of learning for

reaching future goals, but at the moment see no added value to learn. They have agency towards learning, but did not convert this into actual learning.

- **Adults who are learning, but not as a result of being in a realistic position to learn:** this concerns persons who lack agency towards learning and do not see added value, but as a result of pressing external factors (conversion factors) are in some form of organised learning.
- **Adults who are learning as a result of own agentic power and favourable conversion factors:** this concerns persons who made a deliberate choice to learn, make future projections in which learning plays a role and have the supportive conversion factors to materialise this learning motivation.

It follows that adults with differences in agentic power and conversion abilities might also need different incentives to start learning, working on the specific factors that stimulate or prevents them to start learning. The actions to increase agentic behaviour towards learning are different from stimulating learning of adults already possessing aspirations to learn. The presented theoretical perspectives signal systematic challenges for adults in a more vulnerable, or disadvantaged position to participate in learning. The capability approach situates the individual in a wider context that should facilitate an agent to feel autonomy to choose what he/she/it values and asks the question whether the person is realistically at all in the position to choose for learning. In other words: consideration must be given to whether learning is an opportunity that an agent could find valuable. In this context, the agency discussions showed the path-dependency of agents. Aspirations are confined by past experiences making it difficult or risky to break away from past and current social context through starting a learning pathway. For those adults having negative experiences with schooling and learning, starting learning falls in the area of a risky imaginary futures and long-shot aspirations, while for those having a better experience with learning, it is less risky. In addition, in terms of social conditions and welfare state factors, more vulnerable adults have a more bounded or confined agency hampering the willingness to take up learning. Furthermore, the capability approach emphasises that conversion factors unevenly affect a

person's ability to turn potential learning participation (capability) into achieved learning participation (functioning). Again, those individuals in vulnerable situations and with a disadvantaged background with regard to learning are less likely to have the conversion factors needed to turn a desire to learn into actual learning. As stated by Karin Evans, "societies need to ensure that the greatest demands to 'take control of their lives' do not fall on those who are the least powerfully placed in the social landscape they inhabit" (Evans, 2007, p. 93). This is, however, exactly what happens in relation to firstly the agentic capacity (freedom) to value learning (Boyadjieva & Ilieva-Trichkova, 2021; Evans, 2007), secondly the lack of a conducive and supportive environment to start learning (Boeren, 2017) and thirdly, in relation to the take up benefits of adult learning. This means that specific vulnerable adults are, from three perspectives, at a disadvantage to benefit from adult learning (namely, related to reduced agency, reduced conversion ability, reducing benefits of adult learning), making the so-called Matthew principle of accumulated advantage ('the rich get richer and the poor get poorer') even more challenging to overcome.

Instead of looking at barriers to adult learning participation, as shown in this article, policies that aim at increasing participation in adult learning need to take into account a wider set of conditions and factors explaining why adults engage in learning. This implies that policies should shift their conceptual orientation from lowering barriers and offering opportunities towards proactively securing that individuals all have the freedom to view adult learning as a valuable option. This means considering participation not solely as the responsibility of learners themselves, but considering this in "interaction with broader structural conditions within a country or geographical area" (Boeren et al., 2012), hence maintaining that governments can not fully shift responsibilities for starting learning to the individual.

Conclusions

As mentioned in the introduction of the article, we argue that looking at socio-demographic background characteristics and barriers to participation is insufficient in understanding why adults do not learn. Providing the evidence base for adult learning policy development and the monitoring of policies requires a re-examining of how adults' connection to

learning is positioned in a wider social, economic, environmental context and how this context provides a conducive environment in which adults first of all would value learning and can pursue learning. Based on the capability approach, we explored the interplay between different factors that influence whether adults intentionally act towards engaging in organised and structured learning or development activities. Agency, conversion and perceived benefits of learning are mutually enforcing whether adults see learning as a valuable (life) choice.

This approach opens new perspectives to empirically explore the interplay between agency, conversion and benefits and identify main factors stimulating adult learning. This empirical research brings will bring us closer to a validated conceptual model on what prevents and what stimulates adults to learn. A model that is very much needed to evaluate and monitor adult learning and lifelong learning policies delivering on their priority status and combating current and future economic and societal challenges.

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Chapter 3: “I Never Thought I’d Do This. It’s So Empowering”: Adults’ Transitions into Learning

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Abstract

Stimulating adults to learn is a significant challenge, particularly for vulnerable groups with limited education, socio-economic disadvantages, or marginalized. While research highlights barriers and motivations for adult learning, less attention has been given to the transitions adults undergo and the factors shaping these processes. Based on 69 interviews with underrepresented learners in the Netherlands and informed by the capability approach, this study identifies three key movements: learning imposed, driven by coercion; learning through agency development, primarily enabled by external factors; and learning through agency, mainly initiated by intrinsic motivation. These movements are shaped by different combinations of agency factors, life events, and social or institutional support. The findings provide a framework to understand these transitions and inform policies for inclusive adult learning.

Key words

Adult learning, transitions, facilitating factors, capability approach, policy implications

Introduction

Motivating adults to learn who lack interest in or perceive that learning has no value remains a key challenge for modern societies (European Commission, 2017; OECD, 2020). Learning is essential to navigate shifting labor market demands, technological advancements, and societal pressures (OECD, 2019). This is particularly critical for vulnerable groups. Yet, evidence suggests that lifelong learning policies often fail to engage or empower these groups effectively (OECD, 2020), exacerbating social and economic inequalities between those who embrace learning and those who do not (Boeren, 2009; Boyadjieva & Ilieva-Trichkova, 2021).

Although extensive research has explored barriers and motivations for adult learning (e.g. Boeren et al., 2012, 2023; Cabus et al., 2020; Eurostat, 2022), as well as reasons for non-participation (e.g. Kalenda et al., 2024; Kalenda & Kočvarová, 2022), little is known about why at the individual level some adults begin learning, after some time of inactivity related to learning, with minimal support while others remain disengaged despite substantial

(financial) incentives¹. Related to this, less is known about what adults themselves experience as stimuli and barriers in their (micro)context and the interplay of these factors compared to conditional system-related (macro)characteristics that stimulate or hamper learning (Boeren, 2017; Boeren et al., 2023; Boyadjieva & Ilieva-Trichkova, 2021). Understanding the individual pathways adults take from non-learning to learning, alongside the patterns of factors that encourage or hinder these transitions, can inform more inclusive and effective policies.

For the purposes of this article, adult learning refers to activities where adults are learning or developing specific knowledge, skills, and attitudes, associated with pro-actively developing their qualities to sustainably contribute to society, work, their own health, and happiness (Kuijpers et al., 2025). This can range from following a formal education program, literacy training in a library, or sheltered work experiences (i.e. a protected environment for individuals who, due to disabilities or other significant barriers, are not able to participate in the open labor market under typical conditions). In this article we focus on starting learning process, irrespective of the kind of learning. Hence, it is less relevant what kind of learning is pursued by the adult. Vulnerability, or a disadvantaged position to learning refers to whether a person is confined firstly by a less favorable past. Secondly, by less favorable present circumstances to learn, and thirdly, by an imaginary future that shows less opportunities in which the person sees learning as something valuable (Broek et al., 2023).

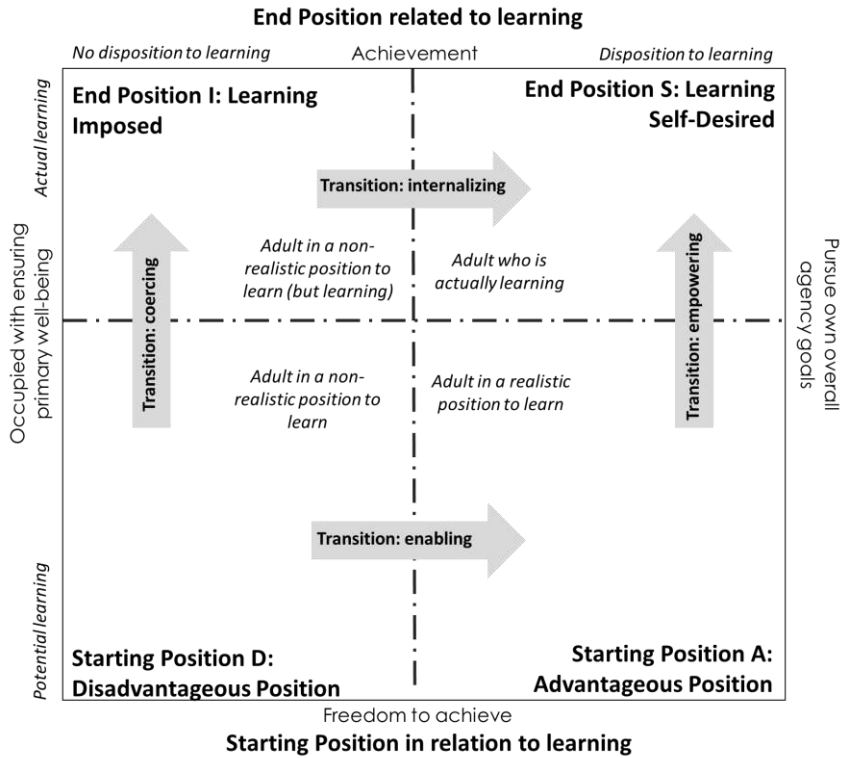
The theoretical framework for understanding transitions towards learning is based on the capability approach (Sen, 1999). This capability framework is chosen as it allows a deeper holistic analysis of why people act or not (for instance, compared to a barrier-related paradigm (Cross, 1981; Roosmaa & Saar, 2017). The framework not only includes the degree of equality of learning opportunities amongst adults, but it also focuses on the opportunities to value learning in the context of adult learning. The capability approach initially considers whether people have equal opportunities to value learning, focusing on aspects such as freedom and functioning. Subsequently, the approach examines the conversion factors

¹ More research is done focusing on individual factors affecting transition to university, also looking at similar processes. See amongst others Gale and Parker (2014).

that enable adults to transform a functioning, such as a positive evaluation of learning, into actual learning. In line with this theoretical approach, Broek et al (2023) presented a conceptual framework that allows mapping transitions adults experience in their adults' journeys from not learning to learning (see Figure 1). In this figure, transitions are represented by crossing dotted lines. Each transition reflects a different process: moving from a disadvantageous position (D) to an advantageous one (A) signifies *enabling* -making something possible or easier - (Cambridge Dictionary, 2025); transitioning from A to self-motivated learning (S) represents *empowering* - to encourage and support the ability to do something (Cambridge Dictionary, 2025); shifting from D to imposed learning (I) reflects *coercion* - the use of force to persuade someone to do something that they are unwilling to do (Cambridge Dictionary, 2025) ; and moving from I to S indicates *internalization* -the action of accepting or absorbing an idea, opinion, belief, etc. so that it becomes part of your character (Cambridge Dictionary, 2025).

Figure 1:

Starting Positions, Transitions and end Positions Related to Learning



Note: Developed by the authors based on Broek et al. (2023), building further on earlier capability approach frameworks (Anand & van Hees, 2006; Gangas, 2016; Sen, 1993).

In line with the theoretical approach, Broek et al. (2023) presented as outcomes of an extensive narrative literature review, a mapping of the factors influencing the transitions. This identified agency-related factors that allow seeing learning as something valuable; conversion factors that allow realizing learning (or that hold adults back from learning); and benefits and results of learning (e.g., adults have equal opportunities to benefit from

adult learning participation). An overview is provided of the identified factors as shown in Table 1.

Table 1:

Factors influencing the transitions

<p>Agency factors:</p> <ul style="list-style-type: none">• Aspiration and forethought (Alkire, 2005; Bandura, 2001; Hammond & Feinstein, 2005). This pertains to an individual's capacity to envision future objectives, develop aspirations for personal well-being, and act in anticipation of upcoming events and evolving circumstances.• Competency and confidence (autonomy) (Bandura, 2001; Boomkens et al., 2019; Ryan & Deci, 2000). Acting effectively presupposes both the possession of competences and the self-assurance to deploy them in practice.• Reflectiveness (Bandura, 2001). Agency also entails the ability to critically reflect on one's own actions, assume ownership, and act in a deliberate and purposeful manner.
<p>Conversion factors:</p> <ul style="list-style-type: none">• Background<ul style="list-style-type: none">• Cultural conversion factors (Allmendinger et al., 2011; Bøhler, 2019). These address how cultural norms, social practices, and customary beliefs shape or constrain the development and expression of individual capabilities.• Educational conversion factors (Field & Lynch, 2015; Hammond & Feinstein, 2005). These encompass the educational opportunities offered to individuals which condition the individual's ability to convert available learning into substantive freedoms and capabilities.• Social environment<ul style="list-style-type: none">• Social conversion factors (Allmendinger et al., 2011; Bøhler, 2019; Field & Lynch, 2015). These pertain to the ways in which friendships, peer communities, and social networks shape or support a person's perceived and actual capabilities.

<ul style="list-style-type: none"> • Familial conversion factors (Allmendinger et al., 2011; Boeren et al., 2012; Bøhler, 2019; Field & Lynch, 2015). These associate the development and experience of capability with the quality and dynamics of familial relationships. • Institutional environment <ul style="list-style-type: none"> • Institutional conversion factors (Boeren et al., 2012; Bøhler, 2019). These dimensions concern the institutional impact on a person's sense of agency and capability, that is, the extent to which entities like schools, unemployment offices, or sports associations enhance or constrain one's ability to lead a life in accordance with personal values and goals. • Employment conversion factors (Boeren et al., 2012; Tikkanen & Nissinen, 2018). These reflect how various work-related characteristics, including occupational status, firm size, working time arrangements, job autonomy, sectoral context, utilization of skills, and mismatches between skills and qualifications, influence an individual's capabilities. • Situational environment <ul style="list-style-type: none"> • Economic conversion factors (Allmendinger et al., 2011; Bøhler, 2019; Tikkanen & Nissinen, 2018). These explore how financial resources, including income and wealth, affect an individual's capabilities and opportunities to lead the life they value. • Political conversion factors (Bøhler, 2019; Field & Lynch, 2015). These designate the impact of macro-level political and economic transformations on the conditions under which individuals can realize their capabilities. • Life events (Feinstein & Hammond, 2004; Jarvis, 2012). Such life transitions may include events like retirement, the onset of illness, bereavement, an empty nest, the cessation of caregiving duties, or the attainment of financial independence.
<p>Benefits and results factors:</p> <ul style="list-style-type: none"> • Economic position and progress (Allmendinger et al., 2011; Balatti & Falk, 2002; Schuller & Desjardins, 2010). These relate to employment outcomes such as job access, job quality, income growth, job security, mobility, and career advancement.

- Personal development and fulfilment (Hammond & Feinstein, 2005; Schuller & Desjardins, 2010). These concern acquired skills, competences, qualifications, agency (e.g. confidence, autonomy), and personal safety.
- Social inclusiveness and democratic activity (Ruhose et al., 2019; Schuller & Desjardins, 2010). These refer to increased social support, participation, civic engagement, cultural capital, and trust.
- Overall well-being and health (Balatti & Falk, 2002; Feinstein & Hammond, 2004; Schuller & Desjardins, 2010). These concern improvements in physical and mental health, happiness, and life satisfaction.
- Education and training (Balatti & Falk, 2002). These relate to acquired learning outcomes, access to education, and progression in learning.

Following these conceptual explorations, this article explores three main research questions: (1) What transitions do adults experience when moving from not learning to learning, and how can adults be categorized based on their transitions? (2) What factors facilitate and hinder these transitions? (3) What policy implications arise to better support these groups to start learning? To answer these questions, the study examines how adults, who successfully engaged in learning, made the transitions from a disadvantaged starting position (i.e. being in a less favorable position related to past experiences, current circumstances and future aspirations to see learning as valuable) towards actual learning (how agency factors and conversion factors interact to facilitate this process). Subsequently we analyzed how the factors can be influenced by policy interventions. In other words: what can we learn to provide better support for those adults to engage in learning?

Method

To address the research questions, 69 interviews were conducted in the Netherlands using a card-sorting method that focused on adults in vulnerable or disadvantaged positions in which learning does not present itself as something valuable, but who despite this, started learning (i.e. a

deviant-case approach: Flyvbjerg, 2006). Proxies for vulnerability relate to having limited (initial) education, facing socio-economic challenges, or being in an unstable/unfavorable employment position. Recruitment of interviewees involved intermediary organizations across three regions: Rotterdam, Groningen, and Achterhoek, with test interviews in Utrecht, Heerlen, and Hengelo. Regional entities, such as employment services and educational institutions, facilitated participant outreach. Ethical approval was granted by the Open Universiteit of the Netherlands, and participants provided informed consent after receiving study information. The background characteristics of the interviewees are presented in Table 2.

The semi-structured interviews, conducted face-to-face between October 2022 and January 2024, lasted 30 to 90 minutes. Three researchers conducted the interviews independently, ensuring consistency through initial calibration and regular consultations (Patton & Patton, 2002). The interviews explored participants' learning journeys, focusing on decision-making processes, background, recent learning activities, barriers, facilitators, and outcomes. Interviews covered personal backgrounds, benefits, and outcomes of recent learning activities, and included a card-sorting exercise to identify key facilitators and barriers to engagement. Following (Brent et al., 2021; Conrad & Tucker, 2019), a card-sorting method was applied, using cards with explanatory text and an image representing stimulating and hindering factors (Table 1). Participants arranged and adjusted cards based on perceived importance in hindering or stimulating learning, with interviewers prompting reflection. Participants were given the opportunity to introduce new cards (by writing a new concept on a blank card). Eight participants used this opportunities, referring usually to individual situations that can be linked to life events (e.g. paternity, sickness). Finally, participants also reflected on potential policy interventions to support learners in similar situations.

Interviews were audio-recorded, with card arrangements photographed, and thematic analysis (Braun & Clarke, 2006) combined with grounded theory (Glaser et al., 1968) was applied. Data were coded against a pre-existing framework (Broek et al., 2023) while allowing emergent themes to surface. Based on how respondents positioned the factor cards on the playing board, the perceived importance in terms of hindering and

stimulating was also codified (from '0': no role, to '3': important role), allowing classifications into the level of importance. The transcripts were used to classify the interviewees by their end-position (learning imposed, or self-desired learning) by assessing the attitude and sentiment expressed to how the current learning trajectory came about and whether there were strong external pressures to learn or whether the interviewee reported a more self-initiated effort to start learning. The analysis, guided by the capability approach (Broek et al., 2023; Sen, 1999), allowed categorizing of participants by their learning orientation (imposed/self-driven), and transitional movements, allowing revealing patterns and relationships among factors, learning activities, and transitions.

Results

Reasoning further based on this conceptual framework, three key pathways from a disadvantaged-not learning position to learning are outlined: (1) learning imposed, where individuals are compelled to learn (D to I), potentially followed by internalizing this learning and developing intrinsic motivation (I to S); (2) learning through agency development where individuals are externally encouraged before they themselves value learning (D to A) and start learning (A to S); and (3) learning by agency empowerment, where individuals already value learning (moved from D to A) and only need an additional push to start learning (A to S). The interviewees were classified by these three movement (Table 2). The remaining of this section details each of the three movements, covering the transition, hindering and stimulating factors, and suggested policy interventions to support similar adults. While the discussion of the three movements is predominantly based on qualitative analyses of the interview transcripts, we also use frequency words ('often', 'many') to indicate that what we describe is illustrative for more than one participant. The annex includes a frequency table of stimulating and hindering factors being mentioned by the members of each of the three movements.

Table 2:*Overview Interviewees by region and movement*

		Movement 1: 'learning imposed'	Movement 2: 'learning through agency development'	Movement 3: 'learning by agency empowerment'	Total
Region	Achterhoek (ACH)	1	3	14	18
	Rotterdam-Zuid (RZ)	4	13	7	24
	Groningen (GR)	0	4	10	14
	Other regions (OTH)	2	4	7	13
Learning in type of organization	Work	7	5	8	20
	Education sector	0	6	11	17
	Welfare organization	0	5	7	12
	Library	0	2	5	7
	Language provider	0	6	7	13
Age groups	30-	0	3	2	5
	30-50	6	15	21	42
	50-65	1	6	7	14
	65+	0	0	8	8
Background	Non-migrant	3	14	25	42
	Migrant	4	10	13	27
Total		7	24	38	69

NB: Interviewee quotes are coded by region (ACH, RZ, GR, OTH), organization (O + number), and interviewee (I + number).

Movement 1: Learning imposed (transition by coercion)

This movement involves adults who neither wish nor are able to learn but do so due to coercion (bottom left to top left in Figure 1). The sample includes seven adults (aged 30–50), mostly in sheltered employment (i.e. protected work environment for people facing challenges in regular work environments), with three Dutch and four from migration backgrounds. Four

participants are situated in the region of Rotterdam-Zuid, where more work-related organizations participated in the study.

Adults in this group often lack intrinsic motivation to learn due to socio-economic struggles and personal challenges. Many, like those with histories of imprisonment, seek structured work for stability: "Last year, I was incarcerated. I encountered many problems and kept running into obstacles. When I was released, I immediately sought help from an organization that could also provide shelter. That's when I ended up on benefits and was asked to come work here, as a kind of daytime activity" (RZ_O03_I01). Barriers such as chronic health issues further impede participation: "I forget a lot... I stay up all night because of the pain" (RZ_O05_I01). Negative experiences reinforce beliefs that learning is not for them, with one participant stating she felt "too old to learn" in her thirties (OTH_I07). Learning occurs incidentally through supported work experience rather than deliberate educational efforts. As RZ_O03_I02 explained, "I'm mainly here to help others and keep myself occupied," while RZ_O03_I01 noted, "I don't need support; I'm independent and just here to keep busy."

In terms of stimulating factors for these adults, supported work experience fostered growth by providing structure and encouragement, building confidence and self-esteem: "The people here respect me a lot... They trust that I can do it" (OTH_I09). Managers often support development through training or challenging assignments: "My team leader suggested internal training to help employees with low literacy" (OTH_I07). Some participants found dissatisfaction with roles motivated change: "This job helped me realize I needed to explore other options" (ACH_O01_I01). Overall, organizational support played a pivotal role. A job coach's belief in one participant's abilities proved transformative: "When people believe in you... it's positive" (OTH_I09). Municipal support stabilized lives, enabling focus on education: "The municipality helped me get my life back on track" (RZ_O03_I01). Community organizations provided financial and vocational guidance, helping participants find suitable pathways: "They reviewed my finances and suggested work that better suits my situation" (ACH_O01_I01). Competence and autonomy act as both barriers and enablers. While low confidence initially hinders learning, imposed learning can build confidence and foster growth. One participant reflected, "I always thought

I couldn't do anything... Now, everyone says: '[name interviewee], you're such a nice person'" (OTH_I09).

Participants benefit most from increased social interaction and societal participation. RZ_O03_I01 noted, "I meet new people from different backgrounds. Sometimes you can learn from each other." Engagement also supports mental and physical health, with RZ_O07_I02 describing tasks as "a kind of physical training... It makes me feel good, mentally and physically."

Policy interventions supporting this movement emphasized external encouragement, tailored support, and fostering self-confidence. Mentors, job coaches, and institutions played crucial roles, providing guidance and financial support to ease transitions. External belief often unlocked potential, with one participant noting, "The trust my director and job coach had in me played a big role" (OTH_I09). Targeted guidance was also crucial in aligning tasks with personal interests: "They actively worked with me to find what suited me best" (ACH_O01_I01). Financial support also helped alleviate barriers: "Here, they really invest in you. Everything you achieve is yours" (RZ_O07_I02). These interventions reduced pressure and encouraged reflection, enabling participants to explore what worked best for them.

All in all, adults coerced into learning by organizations often begin from an attitude of disinterest or perceived inability to learn. Benefits of learning, as reported by participants, include expanded social networks, improved mental and physical health, and increased societal participation. Socially non-conducive environments and lack of self-reflection, together with a lack of self-confidence hindered them to start learning. On the other hand, factors like, coercive support and guidance, supportive workplaces, and organizational encouragement fostered engagement, building self-confidence and skills to learn.

Movement 2: Learning through agency development (transitions of enabling and empowering)

This movement occurs when an adult transitions from being not in the position to learn to a more conducive position and begins learning (bottom left to top right via the bottom right corner in Figure 1). This group's

disadvantaged circumstances initially suppressed motivation for further education, with priorities on survival or family responsibilities. This group was encouraged by others to see the value of learning to overcome disadvantaged circumstances. The group includes 24 adults, mostly aged 30–50, engaged in diverse learning settings (work, education, welfare, library, or language education), and almost half having a migrant background.

For many adults in this group, learning was not initially seen as valuable or achievable. This mindset was often shaped by past experiences, social environments, and emotional struggles, which contributed to feelings of inadequacy and low self-worth. These internalized beliefs, combined with external pressures, created a cycle of hesitation and self-doubt that hindered educational engagement. A key issue was the belief that learning was not meant for them. GR_O01_L1 explained, “In my country, I didn’t learn much... Sometimes I think it’s too hard for me,” reflecting a deeply rooted sense of educational exclusion. Others questioned their capabilities due to limited prior schooling. RZ_O06_I02, who had only two years of primary education, admitted, “I learn but forget quickly, so I lose motivation.” Similarly, OTH_I01 recounted how negative school experiences shaped his view of learning: “If it’s not good from the start, people think, ‘Forget it, I can’t do it.’” This lack of confidence was often paired with guilt and a sense of unworthiness. As RZ_O01_I01 expressed, “I lack confidence. I do a lot, but I feel guilty about everything.” These feelings were magnified by external conditions. RZ_O04_I03 said, “I hesitated so many times before starting my course; taking the first step was the hardest part.” Social environments also played a discouraging role. RZ_O04_I01 shared, “People in my circle didn’t understand why I wanted to study. They said, ‘You’re already too busy.’” These experiences show how not seeing learning as worthwhile or within reach held many adults back, until encouragement, support, or changing circumstances enabled a shift in perspective.

For adults in this group, the decision to start learning was shaped less by internal drive alone and more by external encouragement and support. These learners required significant involvement from their social environment to initiate both the enabling and empowering transitions. Friends, family members, mentors, and local organizations played essential

roles in helping them to see learning as valuable and achievable. Family support often served as the foundation for action. One participant shared, “My family encourages me to keep learning. My son helps with ICT questions for my course, and my husband takes care of our daughter when I work. He really does his best” (RZ_O01_I01). Learning alongside others proved equally powerful: “My friends are also doing the course with [organization]. The fact that we’re doing it together keeps me motivated” (RZ_O01_I01). Social encouragement extended beyond immediate circles. RZ_O12_I02 recalled, “My friend told me about a course... She said, ‘Let’s try it together. You have nothing to lose.’ Her encouragement made me think I could do it.” Similarly, RZ_O04_I03 described how encouragement at school helped her recognize her potential: “People around me motivated me to take a course. They told me I had a gift for working with children.” Organizational support, such as financial aid, transportation, and coaching, also helped overcome practical barriers. “They handled the costs. Without that, I couldn’t have attended” (GR_O06_L1), while RZ_O01_I02 explained, “My coach pushed me to start learning, even when I doubted I could do it.” Finally, life transitions like divorce or migration triggered reflection and action. “After 15 years of giving everything to my family, I thought, ‘Enough, it’s time to do something for me’” (RZ_O01_I02). These external triggers, emotional, social, and practical, were crucial in helping this group move from doubt to participation in learning.

For this group, the most significant benefits of learning lie in personal development, increased confidence, and a greater sense of social participation. Many learners described how education helped them regain self-worth and develop life skills. As one participant noted, “For me, it was about personal development. I wanted to improve myself... it helped me in other areas, like managing finances and feeling proud of what I achieved” (OTH_I01). Learning also opened up pathways to further education. “After improving my Dutch, I earned several diplomas. Now, I’m studying for a vocational education and training (VET) horticulture degree” (OTH_I03). Others echoed this progression: “This course is just the beginning. I now want to pursue VET4 and see where that takes me” (ACH_O04_I04). Beyond individual growth, learners felt more connected to their communities. “I used to feel invisible. Now, I’m seen, heard, and I participate in society, [...] it’s about belonging” (GR_O06_L1).

Adults in similar situations benefit most from policies that combine financial accessibility, cultural sensitivity, and community-based support to develop confidence and agency. Free courses and subsidies help remove financial barriers. As RZ_O12_I02 explained, “The courses were free, which made it possible for me to join.” Trusted professionals and role models can serve as essential entry points. “My psychologist suggested I get involved with [name organization]. That gave me a reason to start” (GR_O01_L1). Policies that recognize cultural dynamics are especially effective. One learner shared, “In my culture, women don’t do many things independently. Here, I learned that I can learn and work” (GR_O01_L1), underlining the need for culturally responsive approaches. Additionally, grassroots networks and practical learning environments boost confidence and engagement. “You learn through practice, and through connections, I understood how to keep going” (GR_O04_L3). Effective policy, therefore, must support accessible, socially rooted, and culturally aware learning pathways, enabling sustained participation and growth.

All in all, wide-ranging external factors (e.g. family, social, institutional, life events) triggered the learning more than the self-activation of the learner. Social environments, organizational offerings and incentives and life events gave the final push to pursue learning, learning mainly to personal development, increased self-confidence and a willingness to continue learning.

Movement 3: Learning by agency empowerment (transitions of enabling and empowering)

This group includes adults starting learning from a disadvantageous position, mainly triggered by their own motivation and then supported through other factors removing specific barriers (bottom left to top right via the bottom right corner in Figure 1). These adults face learning barriers but value it for personal and career growth, seeking favorable conditions to pursue it. It consists of 38 adults, mostly aged 30–50, engaged in diverse learning settings (work, education, welfare, library, or language education), with a large number (11) in formal education, two-third having a native Dutch background.

Despite a strong intrinsic motivation to improve their lives, adults in this group often face a complex web of barriers that delay or prevent them from

engaging in learning. Cultural expectations, caregiving responsibilities, financial hardship, and initial low self-confidence emerge as recurring themes that undermine even the most determined learners. Cultural norms shaped many learners' early perceptions of education. One woman recalled being told in childhood, "As long as you marry, nothing else matters," which deeply impacted her belief in her own educational potential (OTH_I06). Similarly, RZ_O12_I01 reflected on her community's indifference to formal learning: "Many people think speaking [Dutch] a little is enough. Learning isn't necessary because we manage with Turkish shops and neighbors." Such attitudes discouraged learners from pursuing education, despite their curiosity and desire to grow. For many women, caregiving responsibilities created substantial time and energy constraints. GR_O04_L1 explained, "Everything I had to do at home kept me from pursuing learning," while RZ_O09_I01 shared, "I have many roles within my family... it leaves little time for my own learning." These daily demands left little room for personal development. Emotional barriers also weighed heavily. RZ_O04_I02 admitted, "At the start, I found it scary. Looking back, I ask myself, why did I wait so long?" Learners like GR_O04_L4 wrestled with self-doubt: "Part of me could rely on my abilities, but another part was hesitant, which held me back." Structural issues further compounded these personal challenges. GR_O07_L2 described the disruptive effects of bureaucratic instability: "You get a new coach three or four times a year... Each time, I have to explain my whole story from scratch." These combined barriers made learning seem unattainable, even for those with a deep internal drive to succeed.

For adults in this group, the decision to engage in learning was driven by a combination of self-reflection, future aspirations, and institutional support. Their learning journeys required two key transitions: the enabling transition, achieving a realistic position to learn, and the empowering transition, taking action to begin learning. Across both, self-motivation and clarity of personal goals emerged as consistent driving forces. Many learners were prompted by the desire for personal growth and a better future. GR_O08_L3 reflected, "The more you understand yourself, the more you realize what you want to achieve," while GR_O0#_L1 sought to break generational cycles: "I want to be a better example for my children than my mother was for me." Others, like GR_O07_L2, demonstrated perseverance despite lacking

qualifications: “I know I don’t have enough certificates, but I would really like to earn them and start somewhere.” Learners’ personal determination was often forged through hardship. A Somali woman shared how fear initially held her back, but she eventually took action: “The third time, I thought, ‘eyes closed, just go for it’” (RZ_O04_I02). Similarly, a Yemeni nursing graduate acknowledged, “The main key is the Dutch language” (RZ_O09_I01), using that understanding to guide his integration and volunteering efforts. Institutional support played a critical role in the empowering transition. GR_O08_L3 highlighted how a job coach equipped her with materials: “He helped me with a laptop and course materials.” Free community resources made learning accessible: “The computer classes are free, the laptops are free, even the pens are free” (OTH_I13). ACH_O06_I03 added, “My advisor connected me with organizations that help newcomers in healthcare. They sent me a letter, and I immediately said yes.” Together, future-oriented goals, self-reflection, and institutional facilitation helped these adults transition from intention to action, demonstrating the importance of internal drive coupled with external support.

For this group, the benefits of learning, as reported by participants, are strongly rooted in personal development expanded social engagement. Socially, learning reduced isolation. GR_O07_L1 noted, “These courses gave me the strength to socialize again,” while ACH_O06_I03 added, “I had very few friends, but now I have many contacts.” The learning experience also sparked curiosity and ambition. “I’ve learned so much already, and it makes me wonder, ‘What else can I do?’” said GR_O08_L2. Learning allowed learners to invest in themselves despite demanding family roles. As one participant shared, “I’m always busy with my children and the household. This course, I’m doing it for myself” (RZ_O04_I02). Another shared, “I never thought I’d do this. It’s so empowering. I’m not there yet, but I’ve come this far” (ACH_O02_I02). Learners gained new self-awareness and resilience: “Learning involves a lot of self-reflection. You face yourself and realize how to grow” (GR_O04_L2), and “I’ve learned to handle setbacks better and let go of victimhood” (GR_O04_L4).

To effectively support adults in similar situations, that already have a desire to learn, policies must prioritize removing structural barriers to learning.

Financial accessibility is a critical starting point. As GR_O01_L2 shared, “I couldn’t have done other things without support,” highlighting how subsidized programs make learning feasible for low-income learners. Similarly, ACH_O02_I03 noted, “Regional subsidies covered my books and laptop,” showing how targeted financial aid enables participation. Safe, low-threshold spaces, such as libraries, community centers, and workshops, allow learners to explore interests without pressure. GR_O04_L1 appreciated this approach: “I joined a course that was not only about learning philosophy but also about how I view myself.” Social support networks also play a key role. Encouragement from family, friends, or professionals helps adults take the first step. “My family encourages me to keep learning” (GR_O01_L2), and “I put on my coat and just went to school. I didn’t think twice” (OTH_I02) reflect this momentum. Together, accessible resources, financial support, and social encouragement form the backbone of effective policy interventions.

All in all, this group of adults transitioned from non-learning to learning by their own self-motivation and reflection on that learning would benefit them. Earlier hindrances such as cultural challenges and family-related challenges were mitigated by their motivation to learn, support from mentors, organizations, and community programs, empowering them to overcome challenges and actually start learning, leading mainly to personal development and further learning benefits.

Discussion and implications

This study aimed to uncover (1) the transitions adults go through when moving from not learning to learning; (2) the accompanying stimulating and hindering factors; and (3) the suggested policy implications. The study resulted in identifying three distinct groups, each with unique combinations of hindering and stimulating factors and suggested supportive policy interventions. Table 3 provides a summary of these key characteristics allowing a comparison.

Table 3

Summative Table Groups of Adult Learners and Their Movement Towards Learning (N=69) together with the indicative score per factor (between -2 (hindering) and 2 (stimulating))

	Movement 1: 'learning imposed'	Movement 2: 'learning through agency development'	Movement 3: 'learning by agency'																																																																																																																																																																																																			
Transitions	Coercion (possibly internalization)	Enabling and empowering – focus on enabling (value learning)	Enabling and empowering – focus on empowering (realizing valued learning)																																																																																																																																																																																																			
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The study identified different movements of adults towards learning. Movement 1 reflects coercion-driven engagement, where individuals are pushed into learning due to external pressures. Movement 2 involves adults who first develop agency and a positive valuation of learning, subsequently removing practical barriers. Movement 3 represents adults with an already developed learning agency who proactively seek learning opportunities. What can be observed is that each movement has its own particular pattern of stimulating and hindering factors. For the first movement the negative emphasis is on the factors close to the person (agency, background and social environment); for the second movement the positive emphasis is on social and life event triggers; and for the third movement the positive emphasis is on mainly agency factors. This also impacts the suggested supporting interventions, ranging from more steered activation (movement 1) to high-intense tailored encouragement (movement 2) and scaffolded empowerment (movement 3).

In the existing literature there is – to our knowledge - no other classification available that looks at the trajectories of adults. There are however other interesting more static classifications available that can be linked to our

more dynamic classification into movements. Discussing these links allows further operationalization of the cluster and potentially increase its applicability for research and policy development. One recent classification looked at attitudes towards adult learning (Kalenda et al., 2024). This study, using cluster analysis of survey data from 1,200 respondents in Czechia, identified four adult learning attitude clusters aligning with the model presented in our research (Figure 1). The first cluster, negative attitudes, low participation, includes adults who neither value nor engage in learning (bottom left corner in our model). The second, positive attitudes, high participation, comprises adults who view learning positively and actively participate (top right corner). The third, public value, low participation, consists of adults who recognize the societal value of learning but do not engage themselves (bottom right corner). Finally, the fourth cluster, obligation, low participation, represents adults who feel pressured to learn but lack intrinsic motivation and rarely participate (top left corner). These clusters highlight the diverse attitudes influencing adult learning participation. While Kalenda's work highlights the connection between participation and entrenched attitudes, it does not explore how attitudes shape perceptions of learning as a valuable option. Our study provides deeper insights into the dynamics of participation and non-participation indicating what factors support making transitions towards learning.

Looking more closely at specific stimulating and hindering factors as found in literature (Broek et al., 2023), the results indicate that some are more prominent than others. A recurring theme in all groups in the interplay between self-agency (or self-directedness) and the hindering/stimulating power of the social environment, consisting of family, friends, community, and institutional/professional support. Especially, the social context proves for all groups an essential hindering or stimulating factor confirming various theoretical perspectives, amongst others the self-determination theory (Ryan & Deci, 2000), bounded agency theory (Evans et al., 2013) and the capability approach (Boyadjieva & Ilieva-Trichkova, 2021). Another prominent factor is formed by life events triggering learning. Our study demonstrates that specific life events (especially in movement 2) can make learning appear relevant and valuable to adults. These findings suggest that individuals are often motivated to learn when their routines are disrupted, prompting self-reflection and allowing them to envision alternative futures

where learning holds significance. Our results, therefore, support Jarvis' concept of 'disjuncture' as a key trigger for learning (Jarvis, 2012). Furthermore, a recurring theme across movements is that organizations and support structures often fail to take the right actions, lack an understanding of the adult's situation, or are unable to genuinely connect with them to effectively initiate the learning process. Although not devaluing 'agency' factors and self-directedness, the discussed prominent factors (social environment, life events, organizational support) indicate that for many adults and in many of the movements identified, the activation is triggered by an external context that is impactful in the eyes of the adult. For other adults (especially the third group) however, the individual aspiration and reflection (i.e. self-agency) are key factors to learn. This finding resonates well with other research focusing on adult learners having the intrinsic abilities to pursue higher education programs (Laming et al., 2019).

This study finally aimed to derive policy implications tailored to the needs of various groups, with the goal of enhancing support for adults in similar circumstances. Our grouping of adults based on the transitions they went through opens new routes to explore what type of policy interventions could best support specific groups of adults to start learning. Compared to other research on clustering and grouping adults, our study provides deeper insight into the dynamics of participation and non-participation. For instance, while Kalenda & Kočvarová (2022), based on clustering non-participating adults suggest rather shallow practical strategies to promote adult learning, our work offers a more nuanced and tailored perspective on policy implications. There are clear differences in the suggested support systems per group, differing in the prominence of financial support, guidance, exposure to adult learning services and the role of social support. While adults in movement 3 need interventions to encourage them to start accessible learning opportunities, others need a more forceful steered activation (movement 1), or high intense-tailored encouragement (movement 2) taking into account the manifold (life) challenges these adults face before learning presents itself as something valuable.

Overall, the study found that the social environment is for movement 2 and 3 crucial to engage with learning, even for those adults where the learning is principally self-triggered; even they might need an encouragement from

people they value. Given this perspective, this calls for interventions that are more long-term and take into account the social environment of the adults and use this to build a more conducive, and hence realistic, position for an adult to learn, once he or she sees it as something valuable and hence feasible to pursue. This suggests bringing the social environment into the interventions and facilitating family, friends, neighbors, or more broadly the wider society to look after each other in terms of stimulating learning. This could be fostered through public awareness campaigns, but also by appointing roles of specific community figures that can fulfil a 'bridge' function towards learning (IDEA Consult, 2024).

In terms of limitations, the study did not take into account organizational perspectives and how interventions are shaped to support adults. Including these organizational perspectives on what helps people start learning would provide additional insights into how the different groups can best be supported to engage with learning. This information is being gathered as part of the broader research program and will be analyzed in future studies. In addition, with regard to future research, based on the qualitative approach taken and the results obtained, it would be beneficial to further develop a quantitative approach to allow adults (both non-learners and learners) to be grouped according to the movement they completed or that they would need to complete towards learning. This could test the hypotheses expressed in this article concerning the dominant patterns of stimulating and hindering factors per movement. Further exploration is needed on scaling the card-sorting method, potentially using AI to facilitate large-scale (online) data collection. Additionally, linking the dynamic classification of adult learners to other frameworks (a.o. Kalenda et al., 2024; Kalenda & Kočvarová, 2022) could enhance its policy relevance, addressing what works for whom. Together, these steps would refine the movement model, estimate group sizes, and combined with stimulating factors, support the development of a monitoring approach to inform tailored policy actions.

Declaration of conflicting interests

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Chapter 4: Conditions for successful adult learning systems at local level: creating a conducive socio-spatial environment for adults to engage in learning

Broek, S., Kuijpers, M. A. C. T., Semeijn, J. H., & van der Linden, J. (2024). Conditions for successful adult learning systems at local level: creating a conducive socio-spatial environment for adults to engage in learning. *International Journal of Lifelong Education*, 43(2-3), 200-223. <https://doi.org/10.1080/02601370.2024.2338366>

Abstract

Adults need to cope with the skills-related challenges of society and labour market. Currently and in the future, these challenges require learning throughout the lifespan. Especially for vulnerable adults, learning processes should be stimulated in their living and working environment. In this article we present a literature review exploring the conditions constituting a conducive learning environment at meso-level, being the socio-spatial learning infrastructure constituted by learning providers, policies and interventions. The review started with an article title search looking at combinations of key words which was further enriched by assessing relevant studies for well-known international organisations. In total, 23 sources explicitly discussed success factors of conducive learning environments, grouped in those reflecting on local learning centres (three); on learning communities (including cities) (twelve), and adult learning policies (eight). Looking at these different strands of literature allowed to cover the full spectrum of conditions from generic system-related characteristics to nuanced intervention-related characteristics. As a result, twelve conditions were identified, including system-related characteristics (political will, governance, partnership, funding, monitoring) and intervention characteristics (trusting environment, professionalism, guidance, outreach, tailoring to needs, learning leads to progression). Both blocs of conditions impact each other, and they should both be taken into account by policy makers in assessing and developing adult learning policies and interventions at meso-level.

Key words

Adult learning, success factors, learning cities, learning infrastructure, conducive environment

Sustainable Development Goals

SDG 4: Quality education

SDG 10: Reduced inequalities

Introduction

Policy papers suggest that all adults need to learn across the lifespan (e.g. Council of the European Union, 2021; European Commission, 2017; Ministerie van Sociale Zaken en Werkgelegenheid & Ministerie van Onderwijs, Cultuur en Wetenschap, 2018). Continuous learning is needed for individual benefits, societal needs and economic needs (European Commission, 2018a; Schuller & Desjardins, 2010). This calls for inclusive and attractive learning systems for all (European Commission, 2007). In developing those systems, policies and programmes, a call is made for individuals taking responsibility for and showing agency towards learning (e.g. European Commission, 2021; Ministerie van Sociale Zaken en Werkgelegenheid & Ministerie van Onderwijs, Cultuur en Wetenschap, 2018). The plea for individual responsibility and agency towards learning is often accompanied by suggestions to establish learning cultures that are stimulating for adults to continue learning (Lifelong Learning Partnership (Flanders), 2021; Ministerie van Sociale Zaken en Werkgelegenheid & Ministerie van Onderwijs, Cultuur en Wetenschap, 2018), meaning that the socio-spatial context in which adults live and work is formed in such a way that it stimulates adults to take responsibility for their own learning. Hence, encouraging all adults to learn involves developing socio-spatial environments that support individual agency towards learning.

The question therefore emerges what kind of socio-spatial environment is needed to activate all adults, including those in vulnerable positions, to learn. Hence, in this literature review, we conceptually explore what constitutes a conducive socio-spatial environment for adults to learn. This exploration and the identification of success factors can support the development of environments (supported by systems and policies) accommodating all, including vulnerable, adults to continue learning and to allow them to benefit from learning in their individual, social and economic life.

The introduction provides a demarcation of the literature review and elaborates on the conceptual framing of the topic. In terms of demarcating the literature review, we focus on vulnerable adults, mainly those people who lack the necessary resources to independently overcome specific difficulties and setbacks and to shape their lives in the way they desire (SCP,

2015). With adult learning we broadly refer to all types and forms of learning conducted after leaving initial education. It can lead to a qualification (formal learning); organised as learning but not leading to a qualification (non-formal learning) or not organised as learning per se (informal). Furthermore, it can serve different purposes ranging from leisure activities, personal development, or supporting career development. The learning is associated with lifelong development (Ministerie van Sociale Zaken en Werkgelegenheid & Ministerie van Onderwijs, Cultuur en Wetenschap, 2020), being associated with pro-actively developing one's qualities to sustainably contribute to society, work, own health and happiness (Kuijpers et al., 2019; Kuijpers & Draaisma, 2020).

There are different levels influencing a conducive environment for adults to participate in learning. Von Hippel and Tippelt (2010), and Boeren (2017), in researching factors influencing adult learning participation, differentiate between three levels, namely the micro level, meso level and macro level. Whether an adult learner participates in learning hence depends on whether these three levels succeed in creating a conducive learning environment.

Individual agency and contexts that stimulate or hamper learning

At micro-level, there are a number of individual factors that stimulate or hamper an adult to learn (Broek et al., 2023). These factors can relate to whether a person has agency towards learning, meaning that that person has aspirations, competence and autonomy to consider learning valuable. Activation to learn depends on the willingness of the (autonomous) individual, but is likewise dependent on the social context that individual is in and that triggers transformation (Biesta, 2006; van der Veen & Wildemeersch, 2012). Both sociological and socio-psychological theories on agency emphasise the socially embedded nature of agents (for instance, Emirbayer & Mische, 1998; Evans, 2007; Ryan & Deci, 2000). Furthermore, learning itself is seen as social interaction among individuals (Rutten & Boekema, 2012) and, from a social constructivist perspective seen, as occurring in interaction with social and cultural environments (Vygotskiï & Kozulin, 1986). From this perspective, learning is not only a matter of individual agency and situational context (e.g. having time to learn, money to pay for it, and learning opportunities at hand), it also depends on the

wider social context and the communities a person is part of that trigger change or support learning. Hence, this wider environment needs to be taken into account when activating an adult to learn. Without taking the community into account, the vulnerable individual might be left to their own activation abilities, which might already be quite low. Phrased in a capability approach perspective (Nussbaum, 2013; Robeyns, 2005, 2017; Sen, 1993, 1999) the question is about whether a person has the freedom to aspire learning (a capability) and whether the conversion factors are in place to turn this capability into actual learning (functioning).

We will give an example to make the implications of this theoretical perspective more concrete. Imagine a woman with the name Mary, who has an intrinsic desire to learn (agency towards learning) but is in a situation where the family context is not conducive to transit from learning as capability (freedom to learn) to functioning (actual learning). The woman experiences for instance that her husband prefers her to continue caring for the children without combining this with learning. A conducive environment for her could mean that childcare facilities are arranged for the time that she learns (i.e. there is a conducive infrastructure for learning), but more importantly, that the husband is also approached to change his mind towards his wife learning (i.e. there is a conducive social context for learning). Various civil society organisations could play this role.

As illustrated by the example above, understanding learning as embedded in a social context can refer to activating direct social contexts. There are different factors in the social context (familial-, social-, cultural-, and employment-related-context) that can activate a person to learn. Many studies are looking at how the work-context can support self-directed learning, pointing to, amongst others, rewards, leader support, peer support, an open and error tolerant environment (Brandi & Iannone, 2016; European Commission, 2018a; Fonseca et al., 2019). Family support is also considered essential for engaging and continuing learning and adult learning programmes are advised to engage family members as well in the person's learning (Terry, 2007). Furthermore, intergenerational learning is often proposed to engage the whole family in learning and to overcome culture-related barriers to learning (Robles, 2014). The role of the cultural context and how this supports activation can be approached from the

concepts of cultural capital (Cincinnati et al., 2016). Social support or social support networks are also considered important for learning success, pointing at stimulating adult learners to become part of supportive communities for learning (Domingo, 2016). All in all, different social contexts can play a role in stimulating, but also in hindering, an individual to learn (Broek et al., 2023).

Embedding individual agency in a conducive environment at meso-level

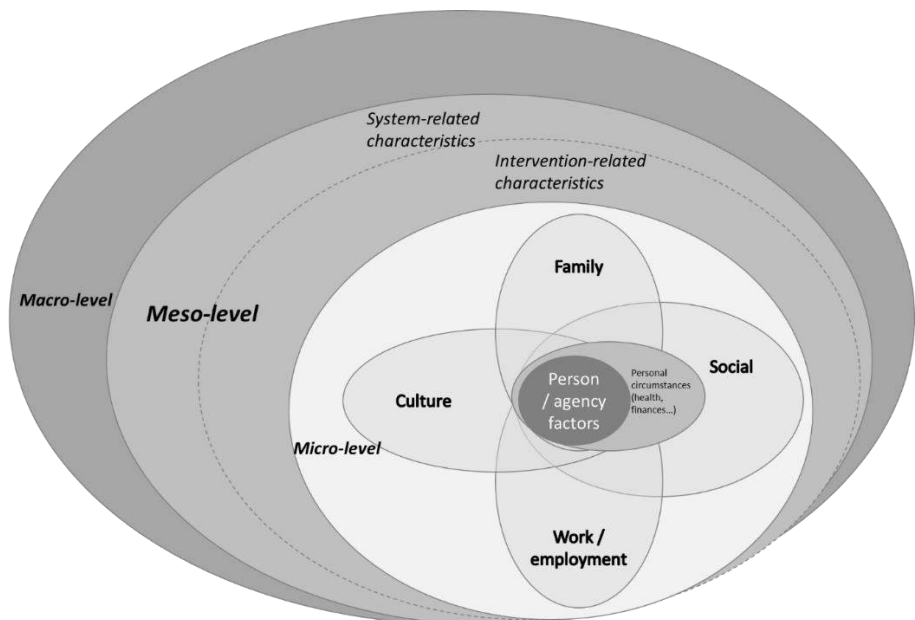
Aware of the different operational levels of learning environments (micro-, meso-, and macro-level) (Boeren, 2017; von Hippel & Tippelt, 2010), building further on explorations at micro level (Broek et al., 2023), we focus in this article on identifying factors conducive for learning at the meso-level, meaning focussing on what learning infrastructure creates the best possibilities for specific socio-spatial context to stimulate adults, embedded in their wider social context, to learn.

This meso-level looks at the whole socio-spatial learning infrastructure that activates a learner (Rutten & Boekema, 2012). People work, learn and live in a local community and have a sense of belonging to the place they live and work (Chang & Cha, 2008). This social-spatial perspective underlies conceptualisations of learning cities, learning regions, and learning communities (Asheim, 2012; Borkowska & Osborne, 2018; Duke, 2010; Longworth & Osborne, 2010; Németh et al., 2020; Rutten & Boekema, 2012; Simmie, 2012). All authors on socio-spatial approaches, while prioritising a local, community or regional dimension for creating a learning-conducive environment, implicitly refer to different levels as they position this intermediate level between the (inter)national level and the individual. The intermediate level is therefore not only the level of the education provider (Boeren, 2017; von Hippel & Tippelt, 2010), but encompasses a much wider learning infrastructure referring to the material, discursive, social and technological mechanisms that enable flows of knowledge, information and educational opportunities, and agency of social actors to work (Facer & Buchczyk, 2019b). In other words, the learning infrastructure does not relate only to the providers of adult learning and their programmes, but the conjunction of heterogeneous activities, institutional forms, and socio-institutional-political factors which can activate individuals to learn.

The meso-level is of particular importance as this is the level where macro level conditions, frameworks, and policies are operationalised into interventions responding to specific adult learning needs in a socio-spatial context. The meso-level hence brings together ingredients for specific interventions and system-related characteristics that enable interventions to be designed and implemented to reach vulnerable adults and get them to learn. Based on the above, Figure 1 presents the analytical approach. At the heart stands the individual, having personal characteristics and personal circumstances. Micro-level influencing factors (culture, family, social environment and work) surround this person. At the meso-level there are system-level characteristics and intervention-related characteristics, whereby the latter stand closer to the individual. The macro-level factors surround the meso-level conditioning any local (meso) level approach to engage a person in adult learning.

Figure 1

Exploratory framework to identify conditions at meso-level to develop a socio-spatial environment for adults to engage in learning



Source: authors

Against this background, the research question for this literature review is: *how can the socio-spatial environment activate a vulnerable person to learn and what conditions constitute such an activating environment at meso-level?* The answering of this question is supported by three sub questions. Firstly, what conditions need to be in place to reach potential adult learners and engage with them? Secondly, what conditions need to be in place in a socio-spatial environment (region, city) to develop an effective infrastructure? Thirdly, what should be prioritised in terms of policies to support putting in place the conditions for an effective infrastructure? Having identified the conditions at the level of outreach, infrastructure and policy helps to see whether existing socio-spatial environments are conducive for activating adults, including those in a vulnerable position, to learn. We analyse the different conditions in different strands of literature and discuss the value of the resulting overview. We also highlight implications for further research and policy making.

Materials and methods

The objective of the literature review was to identify conditions that constitute a conducive socio-spatial environment for adult to learn, especially those in a vulnerable position. The literature review is therefore not a systematic review, but a narrative literature review aimed at theory development, aiming for a new conceptualisation or theory regarding a specific phenomenon covering diverse disciplines (Baumeister & Leary, 1997; Hall et al., 2021; Snyder, 2019). For this purpose, articles had to be identified that deal with adult learning/lifelong learning, mention conditions/factors for success, and that address socio-spatial dimensions. The literature review started with a broad-based article title search in Web of Science looking at combinations of words such as learning cities, region, community, success, lifelong learning, governance, partnership, lifelong, conducive (see figure 2). When scanning the identified articles (title and summary) a long-list of 107 articles was identified. While assessing these articles, additional interesting articles were identified in bibliographies. Furthermore, studies conducted for international organisations, such as UNESCO and the European Commission, dealing with conditions for effective lifelong learning systems were taken into account as well because these sources, often in a synthetic form, or in the form of meta-studies

containing various (national, regional and local) case study descriptions, discuss conditions for successful adult learning policies and interventions. When further reading the identified articles and reports, a total of 70 articles and reports were considered relevant, discussing either in broad terms, or more in detail conducive environments for adult to learn² and those were analysed using Atlas TI, using explorative coding of all text segments that describe specific conducive environments for adults to learn and grouping the text segments that discuss similar conditions. Of the in total 70 articles and reports, 23 explicitly discuss conditions of learning conducive environments relating to adult learning and these are taken into account in the analysis.

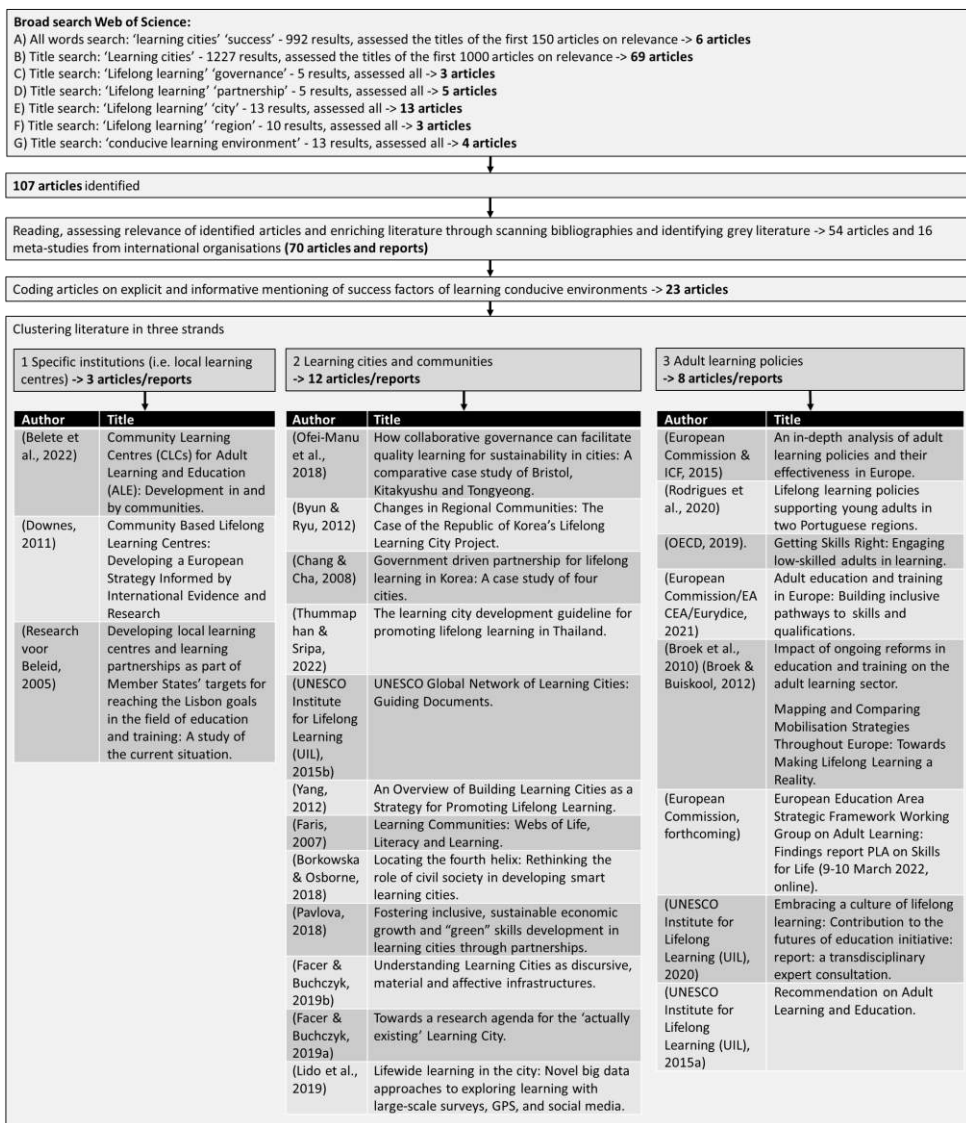
When analysing and coding the articles, the 23 articles were grouped into three strands (in line with the three sub questions as introduced above; see figure 2). The first strand deals with literature on specific institutions (i.e. local learning centres and focused on better understanding what makes the environment of these organisations conducive for adults to learn. In total, two articles and one report were identified that discussed factors explaining successful local learning centres³. The second strand looks at literature around learning cities and communities to better grasp what conditions constitute a conducive spatial environment for learning and looked more specifically at the infrastructural dimension. In total, twelve articles and reports are analysed focusing on success factors of learning communities and cities. The third strand looks at conditions of successful adult learning policies to understand better the aspects that work conditional for setting up effective policies and interventions. In total, eight articles and reports are analysed that discussed conditions for successful adult learning policies and interventions. The allocation of articles and reports to the three strands is done based on the assessment of the content of the articles in terms of on which dimension factors of success are identified (institutions, communities/cities, policies/systems).

² We explicitly avoid 'conducive learning environment' as this tends to be more associated with the environment established by a learning provider for adults that are already enrolled in a programme (Fraser, 1998; Kember et al., 2007).

³ Articles focussing on conducive environments in higher education settings (e.g. Betts & Burrell, 2014; Mbeau-ache et al., 2022), while pointing to similar factors, were excluded in the analysis as these tend to be less directed to learners in the mentioned vulnerable position.

Figure 2

Review strategy and final list of sources



Source: authors

The three strands show a logical division in terms of scope, whereby the first strand deals with institutional aspects, the second with the interplay

between institution and the third with more policy-and governance related aspects.

Results of the literature review – listing conditions for success

The results of the literature review are presented in three separate strands of literature. For each strand the identified articles and reports are discussed and compared in terms of which conditions they refer to. The discussion per strand allows to see the specific characteristics of identified conditions at different levels, whereby the strand on local learning centres is more focused on how to reach out to individual learners; the learning city-strand is more focused on building a local infrastructure, and finally the policy strand is focused on the conditional factors for effective approaches. After this, the results of the analysis are brought together in a comprehensive list of conditions to describe the emerging conducive socio-spatial learning environment.

Strand 1: Conditions at institution-level to reach and engage potential adult learners (local learning centres)

To identify conditions at institution-level to reach and engage potential adult learners in a vulnerable position, this strand of literature looked at articles and reports discussing success factors of community learning centres and local learning centres. Local learning centres or community learning centres are those organisational entities that initiate, develop, and deliver a broad range of educational services or activities to promote adult learning (Research voor Beleid, 2005). A European level literature review sees community based learning centres well positioned to reach out to those experiencing disadvantages and marginalisation through supporting outreach and offering more diverse sites for learning close to communities (Downes, 2011). Learning about success factors of local learning centres, helps us understand therefore how to reach out to vulnerable learners and offer them the support needed to start learning.

In answering the question about what conditions are conducive for lifelong learning and which roles community learning centres can play, Belete et al (2022), present recommendations that can be read as factors for success.

Besides improving governance of education systems and better positioning adult learning systems, the report sees community learning centres as cornerstones of local infrastructures. These community learning centres offer a one-stop shop for a variety of adult learning-related services to all target groups, improve access to adult learning, reduce costs for local governments as costs can be shared across sectors, and finally provide opportunities for other stakeholders (NGOs, universities and the private sector) to use them as a platform for engagement and cooperation. Also focussing on community learning centres, Downes (2011) lists key features for success. Firstly, this concerns providing a welcoming, supportive, non-hierarchical environment for the non-traditional learner, with a personalised learning focus. A second factor of success relates to having a proactive outreach strategy to engage those on the margins. Thirdly, a commitment to democratic engagement with the voices and real needs of the learner, as part of a learner-centred focus and commitment is a factor for success. Downes also mentions the importance of having effective governance and leadership arrangements in place, engaging in strategic partnerships, and conducting institution self-assessment and independent evaluation. The European Commission study on local learning centres (Research voor Beleid, 2005) discusses the success of the education and learning they offer as being motivational (i.e. appealing, relevant, accessible, safe and secure, promising a perspective), being rich (i.e. quality of content, variety, mix of methods, responsive to individual needs), and finally, being reflective (i.e. contact, interaction, feedback, room for experimentation) (Research voor Beleid, 2005, p. 169). Here, the success factors come close to general principles of andragogy and adult learning (Knowles, 1984), emphasising the facilitator's role to help adults move from dependency to self-directedness (Kessels & Poell, 2004).

All in all, the literature on local learning centres emphasises establishing a trusted and motivational learning environment and installing outreach strategies to reach those vulnerable adults that do not have a direct aspiration to learn. The conditions are therefore closely related to the conditions that stimulate learning at micro level. At least in the sense that the measures taken by local learning centres should address those conditions at micro level (agency, personal circumstances, social environment (e.g. work, relatives, family)).

Strand 2: Conditions in a socio-spatial environment to develop an effective infrastructure (learning communities (including cities))

The second strand of literature focuses on conditions related to developing and maintaining learning communities and building effective infrastructures. For this, articles and reports were analysed with a focus on learning communities and learning cities. A commonly used definition of a learning community (encompassing as well the learning city) is offered by Longworth: 'A learning community is a city, town or region, which mobilises all its resources in every sector to develop and enrich all its human potential for the fostering of personal growth, the maintenance of social cohesion, and the creation of prosperity' (Longworth, 2019, p. 109). UNESCO UIL further elaborates that the city uses its resources to promote inclusive learning and foster a culture of learning throughout life, reinforcing individual empowerment and social cohesion, economic and cultural prosperity, and sustainable development (UNESCO Institute for Lifelong Learning (UIL), 2015b, p. 9). Hence, focussing on success factors of learning communities allows us to understand how different organisations can work together in supporting a learning conducive environment for all adults, including those in vulnerable positions.

Fundamental conditions for developing learning communities (including cities) concern securing strong political will; participation of all stakeholders; and mobilisation and utilisation of resources (Pavlova, 2018; UNESCO Institute for Lifelong Learning (UIL), 2015b). Similarly, Yang (2012) lists as building blocks for learning cities, political will and commitment, partnership and networking, assessing of learning needs, increasing learning opportunities, seeing all stakeholders as learning organisations, identifying learning barriers and addressing them so as to create high levels of social cohesion, identify collective learning goals and projects that will benefit the city residents, putting the role of universities into full play, and celebrating and rewarding learning. Thummaphan and Sripa (2022), when reflecting on learning city development in Thailand, Colombia, Germany and South Korea identify as success factors strong leadership, having a clear vision and strategy, engagement of stakeholders, cooperation from all sectors, and sufficient support resources. Chang and Cha (2008), in reviewing learning cities in South Korea highlight the local governance aspect and the partnership approaches as essential to build effective

learning environments. Similarly, Byun and Ryu (2012), after reviewing South Korean lifelong learning cities, conclude that successful learning cities have built networks that include the central government, local organisations, and private companies with similar objectives and shared goals and visions within their communities. Furthermore, they highlight the role adult educators play in bridging to target groups and working as change agents.

In this context, the partnership dimension is an often emphasised factor, enabling individuals to link their learning experiences to their daily life, articulate their learning needs, build their agency to choose, and construct their personalised learning pathways (Atchoarena & Howells, 2021; UNESCO Institute for Lifelong Learning (UIL), 2020). Faris (2007) refers as success factors to partnership (i.e. learning to build links between all sectors and mobilise shared resources); participation (i.e. learning to involve the public in the policy process as well as learning opportunities), and performance (i.e. learning to assess progress and benchmark good practice) (Faris, 2007). Moreover, the governance aspect is highlighted, calling for collaborative governance comprising several conditions including 'process, structure, relationships, a common purpose, principled engagement, shared motivation, institutional design of basic protocols and ground rules, facilitative leadership, involvement of public agencies and non-state stakeholders, modelling and a culture of learning' (Ofei-Manu et al., 2018, p. 376).

Literature within this strand also focuses on more 'soft' conditions for success in learning communities. Facer and Buchczyk (2019b) focus on infrastructural aspects of learning cities, calling to knit together the learning infrastructure of organisations, requiring affective relations, trust between organisations and persons involved. Confirmed in other studies, developing effective learning infrastructures is highly dependent on personal and institutional considerations (Reghenzani-Kearns & Kearns, 2012). Facer and Buchczyk (2019b) also identify the use of affinity groups and ambassadors to reach the envisaged target groups as important factor for stimulating environments. Finally, they emphasise the role of transport and mobility infrastructure to support learning. Developing a learning infrastructure is altogether less an engineering exercise, but rather a nurturing, caring and

seeding exercise (Facer & Buchczyk, 2019b). Formal education and training institutions, such as universities see a role for themselves to nurture the regional learning culture. They, as ‘anchor organisations’, connect deeply with their surrounding communities (Facer & Buchczyk, 2019a). Studies on learning city development also recognise the importance of creating community-led spaces (either virtual and real) for people having shared identities and interests to come together and potentially learn (Lido et al., 2019). Similar findings come from literature on smart cities (see for instance: Curşeu et al., 2021).

All in all, the literature on learning communities shows a wide range of success factors, having to do with governance, partnerships and political will, but also with maintaining personal relations, levelling specific situational barriers for adults to learn (for instance transportation barriers) and building up trusted personal relations. Adding up to the findings from the local learning literature strand, the perspective emerges that developing a conducive environment for (vulnerable) adults to learn is a collective effort in which different types of organisations need to work on each others’ strengths in a nurturing and caring manner.

Strand 3: Conditions prioritised in policies to support an effective infrastructure (adult learning policies)

The third strand of literature focuses on success factors of adult learning policies to understand how policies could support putting in place effective infrastructures. Adult learning policies are defined as a ‘course or principle of action, adopted or proposed by government institutions(s), focused on the area of adult learning in general, or to any sub-sector of adult learning in particular’ (European Commission & ICF, 2015, p. 29). In recent years, many policy studies have been published describing building blocks for adult learning or lifelong learning policies and systems (e.g. European Commission, 2018a; European Commission & ICF, 2015). The multinational studies and European-level reports on favourable conditions for adult learning policies and adult learning systems, which will be discussed below, provide comprehensive overviews of success factors. Looking at the success factors related to adult learning policies and systems allows to identify macro-level conditions (i.e. applicable to national systems), that can also play a role at the meso-level. For instance when it comes to

applying a multi-stakeholder approach or securing funding for adult learning. These issues are not only tackled at the level of national systems (see for instance: Byun & Ryu, 2012; Thummaphan & Sripa, 2022).

A number of European-level reports have been published in the last decade focusing on what constitutes successful adult learning systems. A European Commission study identified success factors of different cases of successful policies and initiatives, namely applying a multi-stakeholder approach, tailoring the intervention to the specific situation the learner is in, ensuring government support, ensuring effective branding of the initiative, offering a combined approach of mobilisation strategies, ensuring monitoring and continuous improvement, securing competent personnel, and finally, ensuring that learning is relevant for both the learner and for others in society/economy (Broek et al., 2010; Broek & Buiskool, 2012). Another European Commission study analysed policies and their effectiveness in facilitating lifelong learning and this study pointed to similar conditions for success, such as making learning relevant to learners and employers, delivering high quality learning, co-ordinating an effective lifelong learning policy (European Commission & ICF, 2015). Besides these conditions for success, the study particularly focused on increasing learners' disposition towards learning through providing targeted guidance, engaging social partners in recruitment of learners, and providing introductory learning experience for learners (European Commission & ICF, 2015). Another European Commission/Eurydice report analysed approaches to promote lifelong learning, with a particular focus on policies and measures supporting adults with low skills levels and qualifications to access learning opportunities. In doing so, the report focused on a number of vital areas, namely: governance and policy frameworks, learning provision, financial support, flexible learning, recognition and validation of learning outcomes, awareness-raising and outreach activities, and finally, guidance services (European Commission/EACEA/Eurydice, 2021). A European comparative report on approaches to develop 'skills for life' pointed to offering trusted learning environments; building broad partnerships; maintaining a learner-centred perspective in offering tailored provision; fostering individual well-being, hospitality, empathy, engagement and sense of belonging; professionalising staff; prioritising guidance and counselling; securing long-term and sustainable funding; and finally,

considering whether quality assurance systems and performance indicators are accustomed to adult learning and working with learners in disadvantaged situations (European Commission, 2024).

In addition to these European reports, the UNESCO 2015 Recommendation on adult learning and education identified five areas for action, namely Member States should develop comprehensive policies, enhance governance of adult learning and education, mobilise and allocate sufficient financial resources, promote access and broader participation, and use appropriate quality criteria and standards (UNESCO Institute for Lifelong Learning (UIL), 2015a). Furthermore, the 2020 UNESCO UIL publication in the context of the Futures of Education initiative presents a vision for lifelong learning in 2050. Some key messages that stand out concern placing vulnerable groups at the core of the lifelong learning policy agenda, establishing lifelong learning as a common good (promote a commons-based approach to lifelong learning, engaging in a dialogue with the corporate sector of the digital economy), promoting local level initiatives that reinforce a learning culture, renew community spaces for learning opportunities, recognizing lifelong learning as a human right (UNESCO Institute for Lifelong Learning (UIL), 2020). The OECD, from a skills perspective, focused on future-ready adult learning systems and suggested as success factors good horizontal (inter-ministerial) co-ordination; building vertical coordination mechanisms between governmental levels; coordinating between government and social partners and other stakeholders (OECD, 2019). In terms of implementation of national policies, studies refer to performance of local actors and the effectiveness of sub-national arrangements. Good collaboration, partnership and alignment between national government initiatives and local actors and institutions is essential (Rodrigues et al., 2020).

All in all, while the success factors mentioned are, in most articles and reports, rather generic in terms of focusing on relevant offerings, quality assurance, integration with guidance services, coordination of measures, and broad stakeholder engagement, these conditions are important pointers for setting the conditions for learning communities (strand 2) and local learning centres (strand 1) to effectively reach out to vulnerable adults to learn (at micro level).

Comprehensive list of conducive conditions

The three strands of literature have a slightly different orientation in terms of suggesting factors for success and conditions for effective activation structures for adults to learn. Discussing them separately, allowed to bring this orientation to the foreground. The local learning centre strand focused more on the direct interaction with learners; the learning community strand on the interaction between different organisations; and finally, the policy strand focused on governance aspects. Without losing these specific orientations, combining these three strands of literature allows to provide an overarching perspective on what conditions should be in place to activate (vulnerable) individuals as part of a community to learn. Based on the above exploration, the following table (Table 1) lists conditions that make the environment conducive for individual activation according to the literature analysed. These conditions are identified through analysing the articles together and categorising the conditions described in those articles. The different conditions are separately discussed in two blocks, being post-coded as suitable classification of the identified conditions. One block of conditions relates more to how specific interventions are designed and implemented (pointing to characteristics of meso-level measures), while the other block of conditions relates more to system-level characteristics (pointing to macro-level preconditions). In each block, the discussion starts with the condition that is most often referred to in the literature. The table also indicates which sources explicitly deal with vulnerable adults or whether the sources discuss the conditions more generically for a wider group of adults, including those in vulnerable positions.

Table 1

Mapping of conditions of learning conducive environments at meso-level to support vulnerable adults to learn.

Source	Strand	Conditions related to interventions										Conditions related to systems				
		Scope	Outreach and communication strategies tailored to the communities to reach	Learning environments that are trusted and motivating	Learning provision tailored to needs	Learning leading to progression in individual, social and economic life	Guidance and counselling services tailored to needs of target adults	Provision of enabling trust with targeted adults	Partnership approaches that support the involvement of a broad range of stakeholders	Governance structures and policy coherence that support local level autonomy	Political will, leadership, and vision ensuring long-term commitment	Long-term training arrangements that take into account the specific needs of adult learning systems	Monitoring and evaluation approaches accustomed to adult learning and working with learners in disadvantaged situations			
1. (Boele et al., 2022)	1	X		X							X					
2. (Downes, 2011)	1	X		X	X						X	X				X
3. (Research voor Beleid, 2005)	1		X		X											
4. (Ofai-Marui et al., 2018)	2		X									X				
5. (Byun & Ryu, 2012)	2					X				X	X	X	X			
6. (Chang & Cho, 2005)	2		X								X	X				
7. (Thammasatien & Sime, 2022)	2		X	X	X						X	X	X	X	X	
8. (UNESCO Institute for Lifelong Learning (UIL), 2015b)	2		X										X			
9. (Yang, 2012)	2		X	X		X	X				X		X			
10. (Levy, 2007)	2		X					X				X				
11. (Borriero & Osborne, 2018)	2		X								X					
12. (Favista, 2018)	2		X								X					
13. (Facer & Buschick, 2018b)	2		X	X												
14. (Facer & Buschick, 2018a)	2		X	X							X					
15. (Lido et al., 2019)	2		X		X	X										
16. (European Commission & ICF, 2015)	3		X	X	X	X	X	X	X	X	X	X				
17. (Rodrigues et al., 2020)	3		X								X	X				
18. (OECD, 2019)	3		X								X	X				
19. (European Commission/EACEA/Eurydice, 2021)	3		X	X		X		X	X	X	X			X		
20. (Brook et al., 2010) (Brook & Buscott, 2012)	3		X	X		X	X		X	X	X	X				X
21. (European Commission, forthcoming)	3		X			X			X	X	X			X		X
22. (UNESCO Institute for Lifelong Learning (UIL), 2020)	3		X	X												
23. (UNESCO Institute for Lifelong Learning (UIL), 2015a)	3		X	X		X					X			X		
COUNT (23)		6	17	11	6	6	4	3	3	15	10	5	4	3		
%		26%	74%	30%	26%	26%	17%	13%	13%	65%	43%	22%	17%	13%		

Source: authors

Conditions related to interventions

The first block of conditions tends to focus on aspects that need to be taken on board in the design and implementation of specific measures to encourage adults to start learning and to continue learning. As indicated in the introduction, there are many conditions at the micro-level that can hamper adults (especially those in vulnerable positions) to see learning as something valuable and meso-level interventions will have to try to turn these conditions into stimulating conditions for learning. This is, as found in the literature review presented, done through effective outreach and communication strategies, providing trusted and motivating learning environments, ensuring that the learning provision is tailored to individual needs, ensuring that learning leads to progression in one’s life, that there

are supportive guidance and counselling services available, and finally, that there are professionals able to support trust building among adult learners.

Outreach and communication strategies tailored to the communities to reach

To reach adults in vulnerable positions, effective communication and outreach strategies are needed, as expressed in 10 of the 23 articles and reports. This relates to broad awareness-raising campaigns (European Commission/EACEA/Eurydice, 2021) as well as to communication tailored to the adults and communities to reach (Thummaphan & Sripa, 2022), and to branding the initiatives (Broek et al., 2010). It even more relates to forging close relations with the communities and key persons within those communities, making use of affinity groups and ambassadors to reach the envisaged target groups (Facer & Buchczyk, 2019b). Furthermore, using education providers, civil society organisations and community spaces closely linked to the target groups lower the barriers for adults to learn (Belete et al., 2022; Downes, 2011; UNESCO Institute for Lifelong Learning (UIL), 2020). In addition, social partners can be involved in the recruitment of learners (European Commission & ICF, 2015). Finally, outreach also means reducing mobility and transportation barriers for learners reaching the learning infrastructure (Facer & Buchczyk, 2019b; Lido et al., 2019). Associated signals for effective outreach concerns tailored and clear messages for the targeted adults, forging links with the adult communities and lowering specific situational barriers (transportation costs for instance).

Learning environments that are trusted and motivating

A quarter of the studies (6 of the 23) refer to providing a welcoming atmosphere to make vulnerable adult learners feel at ease. These adults might have had negative schooling experiences, preventing them to return to education providers. The learning infrastructure, combining different organisations, hence, has to foster individual well-being, hospitality, empathy, engagement and sense of belonging (European Commission, 2024). It will also have to be motivational, safe and secure, and socially attractive (Research voor Beleid, 2005). Furthermore, the environment needs to be a welcoming, supportive, non-hierarchical environment for the non-traditional learner, with a personalised learning focus (Downes, 2011).

The infrastructure could make use of community-led city learning spaces (either real or virtual) for people having shared identities, interests, and aims to come together, exchange knowledge, and potentially learn (Lido et al., 2019). In addition, the learning organisation and content could be linked to daily life (Thummaphan & Sripa, 2022). Hence, associated signals for trusted and motivating learning environments imply that they are built around the targeted (vulnerable) adults and learning is offered at places that are easily accessed by them ('trusted spaces').

Learning provision tailored to needs

Measures taken that enable the activation of adults to learn can differ widely but should be tailored to the specific situation and needs of the adult, the purpose of the adult learning pursued, and the organisations involved as indicated in a quarter of the studies (6 of the 23). Hence, tailoring to needs does not only focus on tailoring the content of the learning programme, but also the form of the programme and the way the programme is brought to the learner. The measures consist of broadly six types of mobilisation strategies, namely, information and guidance strategies; flexibility of learning trajectories; quality assurance and quality of staff involved; outreach work to specific target groups and community-based learning environments; recognition of prior (experiential) learning; and finally, financial instruments (Broek et al., 2010; Broek & Buiskool, 2012).

Interventions combining these mobilisation strategies specifically tailored to the individuals, their needs and the surrounding community could establish a conducive environment for those individuals to be activated and start learning. Many studies refer to first of all increasing the available learning opportunities (Yang, 2012), and increasing the quality of programmes offered (Byun & Ryu, 2012; European Commission & ICF, 2015; UNESCO Institute for Lifelong Learning (UIL), 2015a). Furthermore, the provision needs to be flexible (European Commission/EACEA/Eurydice, 2021) and tailored to the learning needs and prior experiences of the adult learner (European Commission/EACEA/Eurydice, 2021; Yang, 2012). Associated signals for effective provision tailored to needs encompass combined mobilisation strategies, increased opportunities for adults to

learn, quality and flexible programmes offered and tailored to prior experiences and needs of adult learners.

Learning leading to progression in individual, societal and economic life

Another factor for a conducive environment for learning is that the learning is beneficial for the learners and improves their situation as mentioned in 4 of the 23 studies. This requires that the learning should aim at combating exclusion and enhancing social cohesion, promoting wealth creation and employability, and at celebrating and rewarding learning (Yang, 2012). Furthermore, the learning should be relevant for both the learner and for others in society/economy (Broek et al., 2010; European Commission & ICF, 2015). As indicated in the introduction, lifelong development should have this wider perspective on benefits for society, work, own health and happiness (Kuijpers et al., 2019; Kuijpers & Draaisma, 2020). Associated signals showing that learning leads to progression encompass that firstly learners are able to progress in life on the basis of the learning, and secondly, that the learning provision responds to needs from companies and society.

Guidance and counselling services attuned to needs of targeted adults

Another essential factor is to provide guidance and counselling services to increase learners' disposition towards learning, as mentioned in 3 of the 23 studies (European Commission, 2024; European Commission & ICF, 2015; European Commission/EACEA/Eurydice, 2021). Through guidance and counselling, the adult learners, especially those in vulnerable positions, can be supported in making a choice concerning what and how they could learn best. It also allows to develop connections and engagement with the adult learning provider. The guidance could be linked to affinity groups or ambassadors of adult learners coming from a similar vulnerable position. Associated signals for effective guidance services encompass that guidance is broadly available and attuned to the needs of the adults.

Professionals generating trust with targeted adults

Professionalisation and professional development as success factor is only mentioned in three of the 23 studies. There is however additional supporting evidence that professionals are an important factor for effective adult learning systems (Buischool & Broek, 2011; Ioannou, 2023). In securing a conducive environment, at all levels, and in all organisations, professionals

need to be good at their job. For adult learning professionals this means that they are capable in working with adults having different kinds of vulnerabilities (Broek et al., 2010), that are able to build trusted learning spaces (European Commission, 2024), able to play a bridging role to target groups and working as a change agents (Byun & Ryu, 2012), and that they are able to support adults move from dependency to self-directedness (Kessels & Poell, 2004). Furthermore, the professionals working in the adult learning institutions can build relationships with other professionals, needed to develop learning communities and devise effective outreach strategies of multiple organisations, also through assisting and supporting volunteers to reach out to adults and communities in vulnerable positions (Facer & Buchczyk, 2019b; Reghenzani-Kearns & Kearns, 2012). Associated signals concerning having professionals working in the sector encompasses having working conditions in place that make the profession attractive and supporting networking of professions within different organisations.

Conditions related to systems

The second block of conditions relates more to conditions at meso-level that are conditional for effective measures to be designed and implemented to reach and support vulnerable adults and get them into learning. This, as found in the literature review, is done through installing partnerships and assuring involvement of stakeholders, developing governance arrangements, ensuring policy coherence and supporting local level autonomy, fostering political will, leadership, commitment and vision, securing sufficient and long-term funding, and finally, conducting monitoring and evaluation arrangements.

Partnerships approaches that support the involvement of a broad range of stakeholders

As presented in Table 1, many studies (15 of the 23 identified) emphasise the importance of broad partnerships and cooperation between different types of stakeholders as essential to create a conducive learning environment (Byun & Ryu, 2012; Chang & Cha, 2008; European Commission, 2024). Within clear governance arrangements, developing a learning infrastructure requires a multi-stakeholder approach (Broek et al., 2010). In this, formal education and training providers and adult learning

providers play a key role as anchoring institutions (Facer & Buchczyk, 2019a; Yang, 2012), alongside employers and local government and governmental agencies (Thummaphan & Sripa, 2022). However, these organisations cannot act alone and need other organisations such as civil society organisations and community learning centres to ensure that interventions reach those who need it most (Belete et al., 2022; Borkowska & Osborne, 2018; Downes, 2011; Pavlova, 2018). In fact, to establish effective learning infrastructures, all organisations (all institutions and workplaces, including the local authority) need to become learning organisations with continuous improvement programmes for all employees and high quality benchmarked standards (Yang, 2012).

Formalising partnerships is one thing, having them deliver on their intentions is another. For this, partnerships and cooperation in a socio-spatial context rely heavily on the professionals working within organisations (Thummaphan & Sripa, 2022). To share information, mobilise shared resources and to devise joint interventions requires good coordination, affective personal relations and trust (Facer & Buchczyk, 2019a; Faris, 2007). The partnerships therefore have to ensure that those professionals feel heard and engaged in order to keep them motivated to contribute to the vision.

All in all, associated signals for effective partnership approaches to reach and engage adults in vulnerable positions include multi-stakeholder engagement, expanding variety of stakeholders (including non-educational stakeholders), and involvement of employers, civil society, and finally, investments in personal relations among stakeholders.

Governance structures and policy coherence that support local level autonomy

Around half of the studies (10 of the 23) highlight the importance of good governance arrangements. This includes ensuring coherent policies in terms of coordinating adult learning and other economic and social policies at national, regional and local levels (European Commission & ICF, 2015), comprehensive policies in terms of bringing together different forms and levels of adult learning (European Commission/EACEA/Eurydice, 2021; UNESCO Institute for Lifelong Learning (UIL), 2015a), to build effective learning environments at all levels (national, regional and local) (Chang &

Cha, 2008). Furthermore, for national level policies to be supportive to local level developments (OECD, 2019; Thummaphan & Sripa, 2022), they should support local level autonomy (Byun & Ryu, 2012), and should allow for local adjustments according to local needs (Rodrigues et al., 2020). Finally, the governance arrangement should be effective in terms of supporting good cooperation between different stakeholders and support effective leadership through developing a common vision and play towards each organisations' strength (Downes, 2011; OECD, 2019; Yang, 2012). Associated signals for effective governance concern linking different policies, allowing local adjustments, and ensuring different stakeholders to work cooperatively to reach adults in vulnerable positions.

Political will, leadership, and vision assuring long-term commitment

The governance arrangements, as mentioned in almost a quarter of the studies (five out of 23), are supported by political will, leadership, commitment and vision (Broek et al., 2010; Thummaphan & Sripa, 2022; Yang, 2012). This relates more specifically to having a long-term perspective on creating a conducive environment for learning. Some studies highlight this aspect, especially reflecting on local level actions, as prerequisite for participation of all stakeholders, and mobilisation and utilisation of resources (UNESCO Institute for Lifelong Learning (UIL), 2015b). Other studies emphasise the need for shared goals and visions to build networks that include the central government, local organisations, and private companies (Byun & Ryu, 2012). Associated signals related to effective political will and commitment include evidence of having a long-term perspective and common goals between stakeholders.

Long-term funding arrangements that take into account the particularities of adult learning systems

Ensuring sufficient financial resources is another system-level precondition for developing conducive learning environments mentioned in four of the 23 articles. Studies mainly refer to securing sufficient resources (European Commission/EACEA/Eurydice, 2021; Thummaphan & Sripa, 2022; UNESCO Institute for Lifelong Learning (UIL), 2015b), but also highlight the need for long-term and sustainable funding (European Commission, 2024). Furthermore, in general, adult learning is considered grossly underfunded (Belete et al., 2022) and funding systems need to be non-reductionistic and

take into account the particularities of adult learning and working with difficult to reach vulnerable groups of adults (Downes, 2011; European Commission, 2024). Associated signals here relate to seeing evidence of long-term committed financial resources tailored to the characteristics of adult learning and achievable results.

Monitoring and evaluation arrangements accustomed to adult learning and working with learners in disadvantaged situations

Only a few studies (three out of 23) highlight the importance of having in place monitoring and evaluation arrangements to ensure continuous improvements. This applied both at the system level (Broek et al., 2010) and at institutional level (e.g. education provider), supporting self-assessments and independent evaluation (Downes, 2011). Furthermore, performance indicators need to be accustomed to adult learning and working with learners in disadvantaged situations (European Commission, 2024). Associated signals for effective monitoring arrangements relate to the existence of arrangements at institutional and system levels.

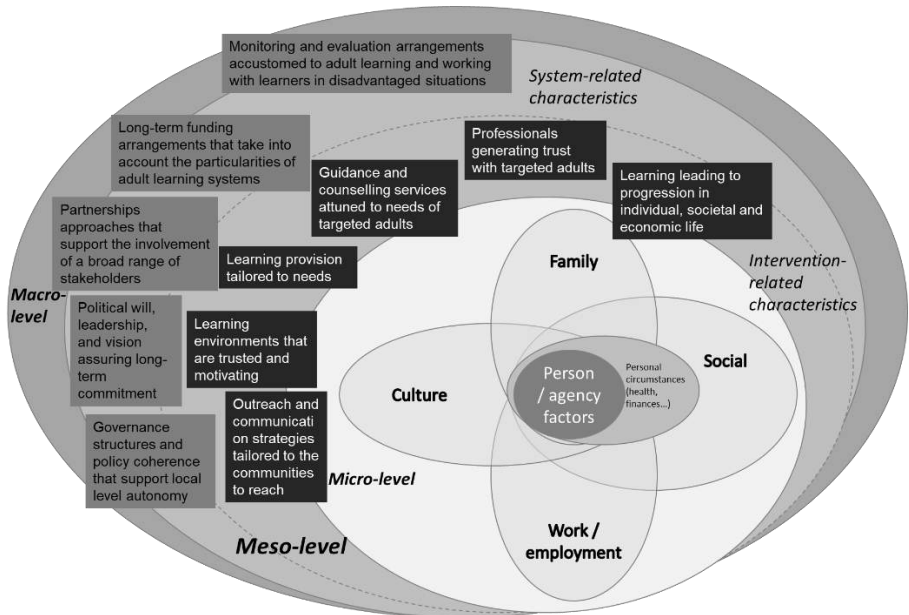
Discussion

This article aimed to conceptually explore what constitutes a conducive meso-level socio-spatial environment for vulnerable adults (i.e. those not supported by a work organisation) to learn. Insight in this is expected to support the development of adult learning systems that are providing all adults with equal opportunities to choose learning. Our starting point was to situate the individual learner in its social context at micro-level to analyse what is needed in terms of systems and interventions at meso-level to activate that person. Starting from the micro-level, earlier research identified a broad set of factors that stimulate and hamper learning (Broek et al., 2023), looking at agency-factors, personal circumstances and different social environments that can stimulate or hamper the take up of learning. Our exploration of literature that focused on meso-level conditions, discussed conditions related to local learning centres, learning communities and adult learning policies and led to the identification of characteristics of conducive environments for individuals being activated to learn. The conditions relate to system characteristics and to the characteristics of specific interventions. Figure 3 provides a summative overview of the conditions, situated in the earlier introduced analytical

framing into micro-, meso- and macro-level conditions for stimulating learning.

Figure 3

Conditions at meso-level to develop a socio-spatial environment for adults in vulnerable positions to learn.



Source: authors

As identified in the literature review and presented in Figure 3, within the meso-level, as system characteristics, building learning conducive environments requires governance, political will and partnerships to take a wider perspective on the social challenges that prevent adults to aspire to learn. This indicates that adult learning policies would require to be closely related to policies in other social domains such as health care, housing, employment, culture etc. Furthermore, it would require funding of policies to allow for flexibility and breaking through policy-silos to design tailored solutions to specific combinations of social contextual hampering factors for learning. Partnerships between adult learning providers and other supporting institutions (in other social domains), and also between the professionals working in all those providers and institutions are key in

delivering this key intention of the whole infrastructure. In addition, in terms of monitoring and evaluation, systems and interventions need to be assessed whether they create a conducive environment in which all adults, including those that are not (yet) in the position to learn, can aspire learning. Monitoring systems would need to go beyond monitoring participation rates in adult learning as this provides too limited insights in whether policies are able to reach those that are not yet in the position to learn (see for instance: Saisana, 2010). All in all, the systems that foster a socio-spatial conducive environment that is sensitive towards having adults, including those not (yet) in the position to learn, and those that are most vulnerable, would have to be based on (local) political commitment, strong leadership, vision, partnerships, long-term and sustainable funding, and supportive monitoring arrangements.

At intervention level, activating individuals in a holistic manner requires approaching potential learners as persons who may face a number of challenges needing to be solved before they can engage in learning. This calls for sensitivity in reaching out to adults, the intake of learners, the environment in which they learn, the assessment of their learning (if needed) and the guidance of learners. While this obviously impacts procedures (e.g. intake), partnerships and the learning process, it impacts first and foremost the professionals working in this field (Buiskool & Broek, 2011): the adult educators, guidance professionals, administrative staff, managers need a level of professionalism that allows them to build partnerships, engage with different groups of learners, make linkages between policy areas (think outside the box) and be a problem solver. This aspect is also emphasised in literature outside the scope of this literature review. There is broad consensus that teacher quality is the most important school variable influencing student achievement (European Commission, 2018b; McKenzie et al., 2005). While this is often stated about school education, it is also valid, or even more valid for those supporting the learning of adults as adult learning generally requires more flexibility, creativity and tailoring to individual needs (Field, 2006; Knowles, 1984). The system level characteristics and intervention specific features need to enable professionals to deliver the intentions of the whole system, being that adults are activated through a holistic approach in which their agency, personal circumstances and social context and the communities the

person is part of, are taken into account to establish a conducive environment for them to choose to learn. As concluded by Facer and Buchczyk (2019b, p. 181) ‘the core concepts of hospitality, of care, of building relationships between people are central to the successful linking up of vulnerable individuals into and with the learning infrastructure of the city [...]. Emotions, personal connections, affective relations, then, need to be understood as central to the development of the learning infrastructure of the city’. All in all, the specific interventions aimed to activate adults to learn, including those that are not (yet) in the position to learn would need to be based on effective outreach strategies, provide trusted and motivating learning environments; should be tailored to individual needs; include guidance services; be provided by professionals that can generate trust and are able to cooperate with professionals in other institutions; and finally, the learning needs to lead to progression.

Together, as suggested through the analysis of the identified articles and reports, these conditions at system and intervention level can constitute the socio-spatial infrastructure that stimulates all adults, including those in vulnerable positions to learn in their own specific social context. Referring back to the story of Mary in the introduction, it would take a well-connected professional to fully understand the situation (through building trust and providing guidance) and to find solution linking adult learning to other social policies to maybe change the mind of husband. This can only happen when a multitude of identified conditions is in place. Adults in vulnerable positions, that do not have individual agency to learn, lack aspirations, self-confidence, or a social environment that stimulates learning need more intense interventions, compared to those adults that are already in a realistic position to desire learning, along the lines of the conditions identified, especially when it comes to outreach, providing trusted learning environments, partnerships with organisations that are close to the targeted adults, and finally professionals that build trusted relationships.

Referring back to the analytical framing in the introduction, the literature review allows to tentatively fill in conditions at different levels supporting a socio-spatial environment for adults to learn. Bringing the literature on success factors together from different perspectives (local learning centres, learning communities, and adult learning policies) allows to enrich

existing overviews of success factors related to the distinct strands of literature into a holistic overview that is sensitive to both more generic conditions (availability of funding, political will, partnerships), and more nuanced conditions that directly relate to the characteristics of the targeted audience. This targeted audience concerns adults that are not (yet) in the position to learn in some structured way and that face some form of vulnerability. Prioritising focus on these adults has implications for developing the socio-spatial environment that is conducive for learning. It makes us focus more on securing effective outreach, providing guidance systems and developing trusted environments. Furthermore, it has implications for the partnership approaches, the vision, governance and how monitoring arrangements are designed and implemented.

Combining the analysis of success factors found in different strands of literature has advantages compared to solely looking at success factors within one strand (see as most comprehensive sources on local learning centres: Downes (2011); learning communities: Thummaphan & Sripa (2022); adult learning policies: European Commission & ICF (2015)) as through combining both the more systematic conditions and the adult learning intervention-related conditions, a cross-link is facilitated between the two blocks of conditions. Both blocs impact each other and should both be taken into account in developing effective adult learning policies and interventions at meso-level. For instance, thinking about partnerships needs to be connected to exploring ways to reach out to groups of vulnerable adults and providing trusted and motivating learning environments. Ensuring that funding arrangements are aligned to the key characteristics of adult learning systems can only be done when there are solid insights what kind of progression (individual, societal, economic) is supported through adult learning. These cross-links between more systemic characteristics and intervention characteristics tend to get lost in existing explorations on success factors and provide limited guidance for policy makers at meso-level to design and implement effective policies. Hence, these system-related and intervention-related conditions together support an infrastructure that allows for the development of an activating context of potential learners. Policy makers at national, regional and local level can reflect on whether their systems and interventions indeed form a consistent and comprehensive socio-spatial infrastructure that is

accessible for all adults, including those that are not (yet) in the position to learn.

This literature research is limited in a number of ways. Firstly, it looks primarily at engagement in some form or organised learning (or education). It therefore leaves out informal learning, something that vulnerable adults might do on a daily basis. Secondly, it focuses on those adults outside of work-context and only briefly discusses the work environment as environment for learning. In real terms being outside work or being employed is not such a clear cut distinction: many adults in a vulnerable position are in some form of (precarious) employment. Thirdly, the literature review looked at a selection of articles and reports found through word searches that include descriptions of success factors. This does not mean that this selection is complete. There may well be further sources that discuss additional relevant success factors. Fourthly, the literature review relied mainly on other meta-studies that discuss success factors in a synthetic manner, summarising findings from multiple case studies, practices at local, regional and national level. Empirical studies on the interplay of different success factors are scarce. Future research, expanding to study more targeted interventions focussing on groups of adults facing specific vulnerabilities, might therefore enrich the current literature review finding other conditions for success, further strengthening the descriptions of the conditions found, and establishing more empirical grounding for success factors identified.

Despite these limitations, this literature review lays the foundations for an empirical approach to study socio-spatial environments in terms of how they are able to activate individuals and how they engage with the individual and the communities that person is participating in. This empirical work can take the identified success factors as a starting point for developing a framework for assessing regional or local level policies and measures taken to develop an environment conducive to learning for all adults, including those not (yet) in the position to learn. This empirical work could explore the relative importance of different conditions and could bring to the foreground conditions that might in the literature be underexposed and focus on the interplay between different system and intervention-related conditions; the cooperation between institutions and the extent to which

systems and interventions take into account a holistic approach to supporting all adults within their social context to learn, especially those in vulnerable positions.

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Chapter 5: Getting it right together: establishing effective local-level infrastructures for vulnerable adults to learn

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Abstract

This study explores how local-level infrastructures can better support lifelong development for vulnerable adults by analysing 29 Dutch organisations across three regions. Using a card-sorting method grounded in capability and social skills ecosystem frameworks, the research identifies key systemic weaknesses, particularly in governance, funding, political will, partnerships, and monitoring. At the organisational level, outreach and guidance are also perceived as insufficient. Yet differences between work integration, education, and welfare organisations reveal opportunities for mutual learning: work-oriented actors excel in flexibility and funding stability; education providers in tailored learning; and welfare groups in trust-building and outreach. Interviewees propose seven key actions to strengthen infrastructures: (1) formalising inclusive governance, (2) aligning lifelong learning with wider political priorities, (3) transitioning to sustainable, regionally pooled funding, (4) embedding learner-centred monitoring systems, (5) building trust-based partnerships, (6) enhancing guidance through dedicated coaches, and (7) co-designing proactive outreach. The research also tests an evaluative framework for assessing learning systems, yielding actionable insights. Ultimately, the study underscores that empowering vulnerable adults through learning requires more than educational provision alone, it demands cohesive, place-based ecosystems that integrate social, economic, and pedagogical support. Coordinated local action is key to getting it right, together.

Key words

Lifelong development; vulnerable adults; local learning infrastructure; social skills ecosystem; adult education policy.

Introduction

Policy documents emphasise the growing need for adults to engage in lifelong learning or better, lifelong development (Council of the European Union, 2021; European Commission, 2017; Ministerie van Sociale Zaken en Werkgelegenheid & Ministerie van Onderwijs, Cultuur en Wetenschap, 2018). Lifelong development refers to activities where adults are learning or developing knowledge, skills and attitudes, associated with pro-actively developing their qualities to sustainably contribute to society, work, own health and happiness (Kuijpers et al., 2025). More than ever, lifelong development is vital for individuals, the labour market, and society at large (European Commission, 2018; Schuller & Desjardins, 2010). In order to meet this need, the promotion of adult learning should be strengthened at the local level, ensuring that learning environments and infrastructures are designed to encourage adults to keep developing themselves in order to participate in society and the labour market (Lifelong Learning Partnership (Flanders), 2021; Ministerie van Sociale Zaken en Werkgelegenheid & Ministerie van Onderwijs, Cultuur en Wetenschap, 2018). Compared to national policies, the local level is considered of main interest as it is at this level that the direct interaction between adult learning and organisations takes place and macro-level conditions, frameworks, and policies are translated into interventions responding to the specific needs of adult learners in a socio-spatial context (Broek et al., 2024).

The extent to which vulnerable adults are motivated to take responsibility for their own learning throughout their lives depends largely on the learning infrastructures at local level. At this level, many conditions can be found that directly and indirectly encourage or discourage adults to engage in learning (Broek et al., 2023).

Defining a local level learning infrastructure to support adults' agency

Whether adults engage in learning depends on a multitude of factors (Broek et al., 2023). These factors relate to whether the person has agency towards learning, but also to contextual (social, work, financial, organisational etc.) factors that allow turning a desire to learn into actual learning. In the capability approach perspective (Boyadjieva & Ilieva-Trichkova, 2021; Nussbaum, 2013; Robeyns, 2005, 2017; Sen, 1993, 1999), this relates to

“whether the person has the freedom to aspire learning (a capability) and whether conversion factors are in place to turn this capability into actual learning (functioning)” (Broek et al., 2024, p. 202). Hence, the learning infrastructure will have to accommodate this by not solely focusing on ‘learning’, but on the whole context in which (vulnerable) people work, learn and live to make learning valuable for them and activate them to take the step towards learning (Chang & Cha, 2008). Thus, the learning infrastructure does not only consist of education providers, but includes a much wider infrastructure including the material, discursive, social and technological mechanisms that enable flows of knowledge, information and educational opportunities, and agency of social actors to work (Facer & Buchczyk, 2019b).

Within this wide learning infrastructure, there are different organisations that play a role in stimulating and supporting vulnerable adults to learn. These organisations can be clustered around the intentions behind supporting adult learning (Desjardins, 2017; Field, 2006). A first intention relates to a labour market (re-)integration focus, viewing adult learning (including learning experiences at work and volunteering) as a way to (re-)integrate adults in the labour market. A second intention relates to an educational perspective, focusing on getting adults to obtain a (formal) education degree. Here, adult learning is seen as a way to obtain qualifications which give the adults enhanced opportunities in the labour market, further learning or life in general. A third intention relates to a societal perspective, seeing adult learning (including informal learning) as a means of social inclusion and increasing self-efficacy and wellbeing. The organisations supporting these three intentions together at a local level form the learning infrastructure enabling adults to engage in learning linked to these intentions (i.e. labour market, further learning, societal inclusion, self-efficacy and wellbeing). Together they support lifelong development.

Conditions for successful local level learning infrastructures

In terms of conditions at local level motivating adults to learn, there are many strands of literature providing insights. These strands mainly concern the literature on learning cities, on learning environments in education institutions, and on more comprehensive skills ecosystems.

Research on how learning cities support human capital development shows the importance of strong political will, partnerships, clear visions, inclusive governance, stakeholder engagement, trusted relations, and infrastructures enabling lifelong learning for all, including vulnerable groups (Facer & Buchczyk, 2019b; Yang, 2012). Within learning cities, education providers are often seen as anchoring or rooted institutions aimed to partner with other types of organisations to activate learners (Facer & Buchczyk, 2019a; Hambleton, 2015).

In addition, the extensive research focusing on learning environments for adults within educational institutions points to aspects such as learner-centred approaches, relevance to life experiences, flexible pathways, supportive teaching, collaborative learning, fostering autonomy, institutional commitment, inclusive policies, and recognition of prior learning (see for instance: Merriam & Bierema, 2014; Schuetze & Slowey, 2002).

Both the learning city- and educational institutions learning environment literature, while referring to important conditions for successful learning infrastructures, maintain a primary focus on educational stakeholders and only limitedly explore more integrally the whole infrastructure and the interplay between different organisations conducive for adults to learn, covering also welfare institutions and labour market-related organisations. These welfare institutions and labour market-related organisations are not only helpful to reach out to adults referring them to education providers, but are also sites of learning in their own right, supporting adults to gain confidence in themselves, solve specific life issues or gain occupational competences (European Commission, 2024).

A literature strand that does shed light on the whole infrastructure is the literature on social skills ecosystems (Spours, 2019). Expanding on earlier concepts on skills ecosystems (Finegold, 1999), the social skills ecosystem approach seeks to develop skills development approaches that forge stronger connections between working, living and learning in a place-based manner with the purpose of nurturing inclusive, sustainable economic, social and educational development in diverse communities, localities and sub-regions (Spours, 2024). The ecosystem should build collaborative horizontalities, meaning network-building to progress to institution-

building; facilitating verticalities, meaning enabling national states and empowering local governments; leadership approaches to support horizontal and vertical interaction; and finally, time for systems to evolve (Ramsarup & Russon, 2023; Spours, 2024).

In a similar manner, going into more detail in looking at the interplay of organisations with different intentions instead of prioritising an educational intention, Broek et al. (2024) presented a comprehensive list of favourable conditions for local and regional learning environments for vulnerable adults, without prioritising education providers above organisations with another primary intention than learning. This list of conditions was developed, as explained earlier, based on a capability approach perspective, exploring what conditions put adults in the position to value learning (having the freedom to aspire learning and turning this into actual learning). These conditions can be divided into two categories. The first category involves system-level conditions that pertain to a network of multiple organisations requiring vertical cooperation according to the social skills ecosystem approach. The second category encompasses conditions for interventions, which are described at institutional level within individual organisations (with focus on work, education and social integration) that following the social skills ecosystem approach should develop horizontal cooperations(see table 1).

Table 1: Analytical framework: conditions for regional-level infrastructures to support adult learning (based on Broek et al., 2024)

Condition	Description
Supra-organisation / system / regional level	
Partnerships approaches that support the involvement of a broad range of stakeholders (Byun & Ryu, 2012; European Commission, 2024; Facer & Buchczyk, 2019a)	Effective partnerships between local governments, educational institutions, employers, and civil society organisations are essential for creating a comprehensive learning ecosystem. Such partnerships should facilitate resource sharing, collaborative planning, and joint interventions to address the diverse needs of adult learners.
Governance structures and policy coherence that support local level autonomy (European Commission & ICF, 2015; OECD, 2019; Thummaphan & Sripa, 2022)	Robust governance structures should promote coherence between national and local policies while allowing flexibility for local authorities to adapt interventions to their specific contexts. This includes ensuring that local organisations have the autonomy to design and implement programmes that meet the needs of their communities.

Political will, leadership, and vision assuring long-term commitment (Broek et al., 2010; UNESCO Institute for Lifelong Learning (UIL), 2015)	Sustained political will and leadership are crucial for maintaining a long-term vision for adult learning systems. This includes setting clear goals, securing funding, and ensuring that adult learning remains a policy priority across political cycles.
Long-term funding arrangements that take into account the particularities of adult learning systems (European Commission et al., 2021; Thummaphan & Sripa, 2022)	Sustainable and sufficient funding tailored to the unique characteristics of adult learning systems is necessary. This includes providing financial support for flexible learning pathways, outreach programmes, and continuous professional development for educators.
Monitoring and evaluation arrangements accustomed to adult learning and working with learners in disadvantaged situations (Broek et al., 2010; Downes, 2011; European Commission, 2024)	Effective monitoring and evaluation systems should assess both institutional and system-level outcomes, with a focus on the impact of learning on disadvantaged groups. This includes using performance indicators that capture not only participation rates but also the quality and relevance of learning outcomes for vulnerable adults.
Institutional / intervention level	
Outreach and communication strategies tailored to the communities to reach (European Commission et al., 2021; Facer & Buchczyk, 2019b; Thummaphan & Sripa, 2022)	Effective outreach and communication strategies are essential for engaging vulnerable adults in learning. This involves using community-led spaces, affinity groups, and ambassadors to reach out to target groups. Communications should be tailored to the specific needs and contexts of the communities being addressed, ensuring that information about learning opportunities is clear, accessible, and relevant.
Learning environments that are trusted and motivating (Downes, 2011; European Commission, 2024; Lido et al., 2019)	Creating a trusted and motivating learning environment involves establishing a welcoming, safe, and non-hierarchical atmosphere. Such environments should foster a sense of hospitality, empathy, and belonging, particularly for vulnerable adults who may have had negative past experiences with education. Learning spaces should be designed to be inclusive, supportive, and responsive to the needs of learners.
Learning provision tailored to needs (Broek et al., 2010; European Commission et al., 2021; Yang, 2012)	Learning provision should be flexible and tailored to the individual needs of adult learners, taking into account their prior experiences, skills, and aspirations. This includes offering diverse learning pathways, recognising prior learning, and providing content that is both practical and relevant to the learners' personal and professional lives.
Learning leading to progression in individual, societal and economic life (Broek et al., 2010; Yang, 2012)	Learning opportunities should enable progression in various aspects of life, including personal development, social inclusion, and economic well-being. This involves ensuring that learning outcomes

	are linked to employability, community participation, and overall quality of life improvements.
Guidance and counselling services attuned to needs of targeted adults (European Commission, 2024; European Commission & ICF, 2015)	Accessible and tailored guidance and counselling services play a critical role in supporting adults to navigate their learning journeys. These services should help learners understand their options, overcome barriers to learning, and make informed decisions about their education and career paths.
Professionals generating trust with targeted adults (Broek et al., 2010; Byun & Ryu, 2012; European Commission, 2024)	Professionals in adult education should possess the skills and attitudes necessary to build trust with learners, particularly those from vulnerable backgrounds. This includes being empathetic, culturally sensitive, and able to act as facilitators and mentors who can bridge the gap between learners and the education system.

Building further on the theoretical explorations, in this study explores the following research questions: 1) Which conditions in local-level learning infrastructures are perceived as insufficient or lacking by organisations with varying intentions? 2) What can the organisations learn from each other in securing conducive conditions? 3) What can be done to improve on the weaknesses and build more conducive infrastructures to support vulnerable adults to learn? As an additional reflection, by answering these questions, at the same time, this paper explores the possibility to use the theoretical framework (Broek et al., 2024) and empirical approach (Broek et al., 2025) as evaluative framework of local level learning infrastructures.

Method

To inform this research, 29 interviews were conducted with representatives of organisations supporting vulnerable adults in learning across the Netherlands. These representatives focused on adult learning for vulnerable groups and had a broad understanding of both internal operations and the regional landscape. Organisations were identified using a snowballing approach in three regions: Rotterdam-Zuid (12 interviews), Achterhoek (8), and Groningen (7), plus two stand-alone organisations outside these areas. The regions were selected to ensure diverse local contexts: Rotterdam-Zuid represents a dense metropolitan area with socio-economic challenges but strong public investment; Groningen reflects a

mixed urban-rural setting with city infrastructure and rural challenges; and Achterhoek, a rural region with many SMEs in technical and logistics sectors, offers a different socio-economic dynamic.

Within each region, a range of organisations was included, varying in size, institutional form, and intentions for adult learning. The selection comprises: (1) organisations focused on work integration via supported workplaces and work-based learning (14); (2) educational institutions providing formal VET and Dutch language programmes, including non-formal training for migrants (8); and (3) welfare organisations aiming to enhance wellbeing and offer learning opportunities (7). A concise characterisation of organisations by intention follows:

- **Work integration intention:** These organisations (14) help adults access or advance in the labour market, targeting those with limited qualifications, literacy, or digital skills. They provide personalised pathways combining skills training, guidance, and collaboration with employers, often including work-based learning, mentorship, and coaching to build confidence and experience.
- **Further learning intention:** These eight mainly formal education providers enable adults to gain recognised qualifications for labour market or educational advancement. Their target groups are diverse, and they offer structured curricula aligned with official standards, blending classroom and digital tools.
- **Societal integration intention:** These seven welfare organisations, including libraries, foster social inclusion and personal development through accessible learning. They serve adults facing unemployment, isolation, or language barriers, offering literacy, digital skills, and wellbeing support. Their services are often free or low-cost and linked with community partners.

Between October 2022 and January 2024, in-person interviews were held at the organisations' facilities. Lasting 30–90 minutes, each session began

with an information leaflet and signing a consent form. Ethical approval was granted by the Open University of the Netherlands.

Representatives of the organisations were invited to interviews using a card-sorting approach (Broek et al., 2025). This method, mostly face-to-face but occasionally online, asks participants to group physical or virtual cards to reflect their thinking about the information provided (Gravlee et al., 2018; Jindal, 2020). In this study, the cards represented conditions for a conducive local learning environment as outlined in the introduction (Broek et al., 2024).

The playing board (see figure 1) had two horizontal fields—whether the condition is in place or not—and a vertical axis showing the importance of the conditions (low to high). Interviewees categorized conditions as present in their local context or absent and needing strengthening. A condition (visualised on a card) could be placed in both categories since each condition had two cards. Interviewees then reflected on the position of their cards, explaining groupings and indicating which conditions were most important (Barton, 2015). Because participants could rearrange cards and revisit earlier decisions, the process encouraged linking conditions within the learning environment and discussing these links. Finally, interviewees reflected on the layout to identify areas needing improvement and policy action.

Figure 1: Set up card-sorting method: cards and playing board

Conditions not in place				Conditions in place				Interview prompts: 1) What do the cards mean for your organisation? 2) Where would you place the card on the board (in place/not in place; level of importance) 3) Why are they positioned where they are? 4) Further follow-up questions: a. How does the organisation reach the different target groups? What is your organisation's approach or outreach strategy? b. What kind of support does the organisation provide to the target groups? What is the intensity of this support? c. What is the background of the staff in your organisation who work with the target group? d. Which organisations do you collaborate with? For what purpose? In what way? e. Are there organisations you do not collaborate with? Which ones? Why? [Consider less obvious organisations, such as those in healthcare, social work, sports, culture, etc.] f. How is the collaboration structured? g. How are interventions and approaches coordinated in the region? Is this effective? 5) What do you consider to be success factors for policies and interventions in your region aimed at promoting agency towards learning?			
Condition not relevant / not applicable											
1 < - < - < - Level of importance - > - > 3											
Monitoring and evaluation arrangements as outlined in local learning and working with learners in disadvantaged situations	Outreach and communication strategies tailored to the communities to reach	Learning environments that are hybrid and enabling	Learning provision tailored to needs	Governance structures and policy coherence that support local level autonomy	Public of will, leadership, and even leadership from commitment	Partnership approaches that support the engagement of a diverse range of stakeholders	Long term funding arrangements that have the capacity to deliver on the objectives of local learning systems	Guidance and counselling services offered to needs of targeted cohorts	Professionals generating trust with targeted cohorts	Learning leading to progression in education, social and economic life	

The card-sorting method facilitates both qualitative and quantitative analysis of participants' sorting patterns (Brent et al., 2021; Cataldo et al., 1970). In quantitative terms, each card representing a condition received a score between 0 (not important) to 3 (very important) based on the position on the playing board, allowing conducting calculations on the importance of the conditions and comparisons between (types of) organisations. These quantitative assessments were further validated and substantiated by the qualitative information provided by the interviewees. The qualitative analysis of these conversations was carried out using Atlas TI, whereas quantitative examination of selected factors employed Excel. The overall analytic strategy drew upon thematic analysis (Braun & Clarke, 2006) and grounded theory (Glaser & Strauss, 2017), aimed at arriving at thick descriptions of how the conditions for conducive learning infrastructures can be understood within their context (Geertz, 1973; Luhrmann, 2015). The Interviews were audio-recorded, and photographs were taken to document the final arrangement of cards on the board.

Results

In this section, firstly, the perceived weaknesses are discussed, making use of the outcomes of the card-sorting method, presenting both the quantitative scoring of the different conditions and a qualitative discussion

on the most important weaknesses based on the interview transcripts. Also comparisons are presented between the three groups of organisations. Secondly, the suggestions for further action and improvements are discussed as mentioned by the interviewees, allowing to identify avenues for more effective policy action to get vulnerable adults to learn.

Overview of perceived weaknesses in the local level learning infrastructure

This section presents the reflections from the interviewees related to which conditions are considered not to be in place in their local level learning infrastructure and to what extent they consider these conditions a weakness in the whole infrastructure. Table 2 presents the average calculations of how the interviewees placed the cards on the playing board indicating their weakness in the infrastructure. In total, the 29 organisations placed 113 cards on the playing board as not being in place (average per organisation 3.9) ranging from 0 to 5 cards. The emerging patterns, further enriched with qualitative statements from the interviewees, are discussed below the table, splitting between the supra-organisational conditions and the institutional conditions.

Table 2: Weaknesses in local infrastructures (N=29): scale 0 (not an important weakness) – 3 (an important weakness)

Supra-organisation/ system / regional level	Total mentioned as weakness (29)	Total selection	Work (14)	Education (8)	Social welfare (7)
Political will, leadership, and vision assuring long-term commitment (system)	10	0.69	0.79	0.63	0.86
Governance structures and policy coherence that support local level autonomy (system)	12	0.76	0.57	0.25	1.43
Partnerships approaches that support the involvement of a broad range of stakeholders (system)	13	0.79	0.50	0.88	1.29
Monitoring and evaluation arrangements accustomed to adult learning and working with learners in disadvantaged situations (system)	14	1.00	1.21	1.63	0.71
Long-term funding arrangements that take into account the particularities of adult learning systems (system)	21	1.21	0.71	1.25	1.29
Institutional/ intervention level	Total mentioned as weakness (29)	Total selection	Work (14)	Education (8)	Social welfare (7)
Learning leading to progression in individual, societal and economic life	1	0.03	0.07	0.00	0.00
Professionals generating trust with targeted adults	3	0.10	0.14	0.00	0.14
Learning provision tailored to needs	7	0.38	0.64	0.00	0.29
Learning environments that are trusted and motivating	4	0.34	0.57	0.25	0.00
Guidance and counselling services attuned to needs of targeted adults	12	0.76	0.71	0.88	0.71
Outreach and communication strategies tailored to the communities to reach	16	1.10	0.50	1.75	1.57

In general, at the supra-organisational level, all conditions are considered facing challenges: at least one-third of the interviewees mentioned each of the conditions as a weakness. Political will is considered volatile, policy coherence is questioned and partnership approaches are not always well

developed across segments of the infrastructure. The most challenging conditions however concern partnerships approaches, monitoring and evaluation arrangements, and the long-term funding arrangements (see a more elaborate discussion below).

At the institutional / intervention level, interviewees were generally more positive compared to the supra-organisational level. Reflecting on what was done in their own organisation on the discussed topics (conditions), they did not see many weaknesses related to professionals, learning tailored to needs, learning leading to progression, and trusted and motivating learning environments. The interviewees were more negative about guidance and counselling and outreach and communication strategies (see a more elaborate discussion below).

Differences between organisations by dominant intention

The organisations differ in how they support adults and define their core strengths. Those with a dominant work-related intention view flexibility as central, adjusting delivery and content to individual needs, aiming to improve employability and long-term life chances through practical interventions. Organisations focusing on further learning accommodate adults balancing work and family with flexible schedules and formats, placing strong emphasis on mentorship and guidance to maintain motivation and confidence. Collaborations with industry and community partners ensure their education remains relevant and future-oriented. Welfare organisations focus on personal guidance, informal learning, and community outreach to empower individuals and foster societal engagement. They see themselves as safe, supportive spaces where adults can take initial steps toward personal growth.

Differences emerge in how organisations assess the importance of conditions not being in place (see table 2), with both supra-organisational and institutional conditions discussed.

Supra-organisational conditions: Organisations with work integration or further learning intentions are more negative about monitoring compared to those with societal integration intentions (work: 1.21; education: 1.63; social welfare: 0.71). Education providers particularly see monitoring as a weakness, citing limited data to measure programme impact and the

inability to track adults across organisations. Welfare organisations, in contrast, maintain longer-term engagement beyond specific programmes. Work-related organisations are less negative on funding (0.71) compared to education (1.25) and social welfare (1.29), as employment activation is funded more sustainably. Social welfare organisations are most negative about governance (1.43 vs. work: 0.57, education: 0.25), partnerships (1.29 vs. 0.50 and 0.88), and political will (0.86 vs. 0.79 and 0.63). Being smaller and less represented locally, they feel the lack of governance structures and partnerships more strongly. Education and work organisations often operate internally, while welfare organisations frequently collaborate to address complex adult challenges.

Institutional conditions: Work integration organisations are more positive about outreach (0.50) than education (1.75) and social welfare (1.57) organisations, as they often rely on municipal referrals rather than actively finding participants. For welfare organisations, reaching vulnerable adults is both a key strength and an area needing improvement. Education providers also see the need to improve outreach. Education and welfare organisations are less positive than work organisations regarding tailoring learning to adult needs (work: 0.64; education: 0.00; social welfare: 0.29). Education providers consider this fully in place, while work organisations cite limited pedagogical expertise. Social welfare organisations rate learning environments as more trusted and motivating (0.00 vs. work: 0.57; education: 0.25), reflecting their core strength.

Most prominent weaknesses

In the following sections, the seven most prominent weaknesses (out of eleven) are examined in more detail, based on how interviewees discussed conditions not being in place. First, five supra-organisational conditions are presented -political will, governance, partnership, monitoring, and funding - followed by the organisational conditions of guidance and outreach. Conditions such as learning leading to progression, professionals generating trust, tailored learning provision, and trusted, motivating learning environments were not seen as major concerns (see Table 2). Quotes from interviewees are included, indicating their dominant organisational intention (work, education, welfare) and region (ACH: Achterhoek, GR: Groningen, RZ: Rotterdam-Zuid, OTH: other).

Political will, leadership, and vision assuring long-term commitment (system)

Ten of the 29 interviewees cited political will as a major weakness in regional learning ecosystems. While ambitions around participation, inclusion, and lifelong development are voiced, implementation often falls short. One interviewee remarked, “The political will is there... it’s in the programmes. But apparently, it must cost nothing” (work, GR_O06). Another added, “There is political will and vision, but leadership and commitment are not always fully present” (education, RZ_O01). This gap is most evident in funding and follow-through. Despite enthusiastic municipal responses, support often stalls after initial endorsement: “They loved the project... but nothing happened afterwards” (work, GR_O06). Local autonomy proves hollow without financial backing: “We had the freedom to act locally, but they didn’t want to fund exploitation costs” (work, GR_O06). Instability in political leadership exacerbates the issue. Shifting administrations reset priorities, undermining long-term efforts on structural issues like poverty. “Every four years... everything starts again” (work, RZ_O07). Political colour heavily influences direction: “Radically different choices are made depending on who is in charge” (welfare, RZ_O10). Governance is also siloed and fragmented, with policy officers pursuing separate agendas. “Everyone knows it doesn’t really work, but no one can break through the system” (welfare, RZ_O08). Even with commitment, lack of shared vision hinders collaboration: “We start with cooperation, but once institutionalised, it’s dropped again” (work, ACH_O01). Finally, national leadership is seen as insufficient: “Locally we have some leadership, but I miss political will and vision at national level” (work, ACH_O07). In short, political will is often symbolic rather than strategic, and its fragmented, underfunded, inconsistent nature limits the development of sustainable, inclusive regional learning ecosystems.

Governance structures and policy coherence that support local level autonomy (system)

Twelve of 29 interviewees identified governance as a major weakness. Local learning infrastructures often suffer from fragmentation. Promising initiatives emerge but frequently operate in isolation, without coordination or alignment. As one interviewee in Rotterdam-Zuid explained, “Every sail

has its own policy. Through the RWC [Regional Work Centres; a newly established cooperation structure], we try to bring all the parties together and look at how we can better align our policies... but it takes a lot of effort” (education, RZ_O01). This disjointedness creates barriers for professionals and, especially, vulnerable learners, who struggle to access consistent support. Governance structures are often informal and underdeveloped. “Is it there? Informally, yes. Formally, no” (work, RZ_O03). The absence of formal frameworks limits strategic planning, collective decision-making, and long-term implementation. Fragmentation and duplication persist despite good intentions. Local autonomy, typically a strength, is undermined by top-down policies and unstable political direction. “The politicians make a plan... but in practice, it’s not workable” (welfare, GR_O05). Even when autonomy is granted, substantive support is lacking: “Yes, autonomy... but we didn’t really feel the support” (work, GR_O06). In regions like the Achterhoek, a proliferation of uncoordinated initiatives further fragments the landscape. “So many parties... it’s all very fragmented” (work, ACH_O02). While potential governance structures exist, strategic direction is missing: “A course or strategy? No, I don’t think we’re there yet” (work, ACH_O08). Ultimately, informal networks and ad hoc partnerships cannot replace integrated, accountable governance. Without shared vision, stable coordination, and political commitment, regional learning systems remain weak. As one interviewee put it, “Everyone wants it... but the system works against people” (welfare, GR_O05).

Partnership approaches that support the involvement of a broad range of stakeholders (system)

Thirteen of 29 interviewees identified partnership approaches as a weakness. Despite growing cross-regional and cross-sector partnerships, many fail to foster inclusive, effective collaboration. Fragmentation and institutional self-interest often outweigh collective needs. “They should focus less on getting money for their own organisation, and more on what this region actually needs” (welfare, GR_O04). Competition over funding further erodes cooperation: “As long as I win my tender application, I’ll see who I want to work with later” (education, RZ_O04). Partnerships often lack coherence and long-term focus. Many are project-based, temporary, and siloed. “The system is persistent... even if some try to innovate, others fall back on the rules, and then you hit a wall again” (welfare, GR_O05).

Overlapping initiatives, driven by self-interest, hinder joint efforts: “They sometimes overlap. That can be obstructive” (work, ACH_O01). Rigid formal requirements stifle innovation, while municipal engagement is unreliable. “We’re regularly let down by the municipality,” noted one interviewee (work, GR_O06). Poor mutual awareness and weak information flows limit synergy: “Everything is made into small, manageable chunks... it’s hard to see the forest for the trees” (welfare, RZ_O08). Competition and misunderstandings between formal and non-formal providers add to the problem: “Everyone wants to keep what they get... this shouldn’t compete, it should complement” (work, OTH_O01). Finally, partnerships often depend too much on individual champions. Without mandate or continuity, progress falters: “It really depends on the people... some municipalities do great, others not at all” (work, ACH_O07). This person-dependency underscores structural fragility in partnership governance.

Monitoring and evaluation arrangements accustomed to adult learning and working with learners in disadvantaged situations (system)

Monitoring and evaluation are widely viewed as underdeveloped elements of regional learning infrastructures, cited by 14 of 29 interviewees. While stakeholders collaborate on initiatives, systematic mechanisms to track outcomes and societal impact are lacking. As one interviewee noted, “We continuously invest in pilots and projects, but after completion, there is hardly any follow-up. We just don’t know whether the interventions create long-lasting effects” (welfare, GR_O04). Others echoed this, seeing evaluation as “mostly a formality” (work RZ_O02). Practices are often fragmented. “Monitoring is very ad hoc. Each partner has their own key performance indicators, but there’s no integrated approach to assess collective impact” (welfare, GR_O05). Another added, “We evaluate regularly, but it is fragmented and not region-wide” (work, RZ_O03), while a third said, “Not really, it’s fragmented” (work, ACH_O05). This lack of coordination hinders shared learning and accountability. Depth is also missing: “It remains a checkbox exercise instead of deep learning” (work RZ_O05) and “That’s still too weakly embedded in our region” (work, ACH_O01). Accountability often prioritises financial compliance over learning: “Requirements focus on financials rather than learning effects” (education, RZ_O04). Even when valued, monitoring lacks urgency: “Monitoring and evaluation is very important but hardly a priority”

(education, ACH_O04). Collaborative reflection is rare: “No, and we rarely reflect together” (work, ACH_O02). Without embedded frameworks, adaptive policy development stalls, and societal returns remain unclear, weakening the strategic position of regional learning systems.

Long-term funding arrangements that take into account the particularities of adult learning systems (system)

Long-term funding is a major weakness in regional learning infrastructures, cited by 21 of 29 interviewees. Most initiatives rely on temporary, project-based funding, creating instability and fragmentation. “We live from subsidy to subsidy... just to keep existing partnerships alive,” said one interviewee (welfare, GR_O05). Others echoed: “Projects are often temporarily funded and then everything stops again” (education, RZ_O01), and “Funding... remains ad hoc” (work, ACH_O07). This short-term approach discourages strategic investment in sustainable infrastructure. “There is no structural funding stream to build the ecosystem as a permanent feature. It always depends on political priorities,” noted one interviewee (work, GR_O06). Another added, “Funding... it’s a political choice each time, so not structural” (welfare, OTH_O02). Interviewees stressed the cycle of starting over: “We often sit at the table for years, but then a project ends, the funding stops, and we’re back to square one” (work, ACH_O05). Funding is “always temporary and uncertain” (welfare, RZ_O08), “not structurally secured” (education, RZ_O06), undermining continuity, trust, and long-term planning. Even successful programmes remain precarious: “The resources from prestatie010 are good but temporary, so uncertainty remains” (work, RZ_O05). This uncertainty weakens collaboration, staff retention, and innovation. One interviewee summarised: “To what extent is there budget to secure this in the long term?” (work, ACH_O01). Without stable funding, regional learning infrastructures risk remaining fragmented projects rather than resilient lifelong development systems.

Guidance and counselling services attuned to needs of targeted adults (organisation)

Guidance and counselling are often cited as underdeveloped elements of regional learning infrastructures (mentioned by 12 of the 29 interviewees). Despite ambitious visions for learning regions, practical implementation of guidance remains fragmented and insufficiently embedded. Current

systems are short-term and not sufficiently person-centred. As one interviewee warned: “Attention and guidance are essential... you can enrol someone in a programme, but without guidance you leave them alone with a high chance they will start drowning” (work, ACH_O01). Another added: “And if you look purely at finances, there is actually a kind of compartmentalisation between the different funding streams, and then the question is who pays for the part of guidance, coaching and aftercare. In practice, you really notice that this always remains a bit vague” (education, GR_O07). This fragmentation means learners, especially vulnerable groups, often lack tailored support connecting education, work, and personal development pathways. “We find that guidance and counselling offers are still too fragmented and not always tailored to the learning pathways of individuals. There is a need for more integrated services that connect education and work transitions seamlessly” (work, RZ_O03). Such gaps undermine the potential of learning infrastructures to foster inclusive, sustainable participation. Stakeholders call for integrated cross-sectoral financing models and dedicated roles for guidance professionals to address this weakness.

Outreach and communication strategies tailored to the communities to reach (organisation)

Outreach and communication strategies are widely viewed as weak within regional learning infrastructures (mentioned by 16 of 29 interviewees). Despite multiple initiatives, the reach to target groups remains limited and fragmented. One interviewee noted: “These outreach and communication strategies are often not aligned. Everyone does their own thing a bit, but there is no joint campaign or recognisable message towards citizens” (work, GR_O06). This lack of coordination reduces visibility and accessibility, particularly for groups least aware of available opportunities. Current approaches rely too heavily on passive information provision: “People don’t come because they saw a flyer. You need to reach out, talk, and show you care” (work, ACH_O01). Another interviewee stressed: “We have to do much more on outreach and communication, because currently the efforts are scattered and lack clear branding. People don’t know where to go, and each municipality or provider uses different language and channels” (education, RZ_O01). The issue is intensified for those with limited digital or literacy skills: “Many people are not digitally literate. If something is only

online, they won't find it. They need a guide to search with them” (education, RZ_O06). Reaching low-literate groups requires tailored, relational approaches: “Native Dutch low-literate people are very hard to reach. If reading and writing is hard, why would you go to the library?” (welfare, RZ_O09). Personal networks and informal communication work better: “We reach people through via-via. Children take flyers home for their parents. Mouth-to-mouth communication works better than formal channels” (welfare, RZ_O06). Even in regions with strong initiatives, visibility remains a barrier: “We’re very bad at it. That’s a real improvement point. In the Achterhoek a lot of great things happen, but it doesn’t get beyond Arnhem. It depends too much on individual people and networks instead of broader exposure.” (work, ACH_O01). Such insights reveal a structural weakness: outreach efforts are fragmented across municipalities, providers, and employers, lacking unified branding, language, or entry points. Effective communication requires shared strategies, simplified language, and co-designed campaigns. Without this, learning infrastructures risk perpetuating exclusion rather than fostering inclusive lifelong development.

Suggestions from interviewees for actions and improvements

While the previous section outlined weaknesses in local learning infrastructures, this section presents actions addressing them, building on strengths such as progression, trusted professionals, tailored provision, and motivating environments.

1. Securing and stimulating political will

To secure long-term support, lifelong development must be linked to broader priorities - labour market resilience, social inclusion, digitalisation, and regional development. Framing learning as a means to achieve wider goals increases its political weight. As one interviewee noted: “If this works, people go to work, they feel better, they become role models for their children... it pays off for everyone” (education, ACH_O06). Multi-year regional strategies with clear plans and resources can create continuity beyond election cycles. Building coalitions of municipalities, education providers, employers, and communities is vital. Political will is also strengthened by evidence of impact - combining data with personal stories - and by supporting local champions, such as councillors or mayors, who advocate for learning. In short, political will grows through strategic

alignment, broad coalitions, compelling narratives, and empowered champions.

2. Improving governance

Integrated, place-based governance structures are needed at regional or subregional levels, such as formal learning coalitions involving municipalities, VET institutions, employers, libraries, and social partners. “You need to know from each other who does what, and make the services complement each other” (work, ACH_O02). Platforms must move beyond symbolic dialogue toward strategic coordination, aligned funding, and joint monitoring. Shared data, referral systems, and role clarity build trust and prevent duplication. Including learners and communities ensures bottom-up innovation. Dedicated coordinators or brokers maintain momentum. Effective governance requires institutionalised, inclusive, and operationally aligned partnerships with clear mandates and sustainable facilitation.

3. Addressing financial challenges

Interviewees stressed the shift from project-based to structural, multi-year funding. “We need a future-oriented vision with financial resources... bundling strengths and services to complement each other” (work, ACH_O02). National tools like STAP (i.e. an individual voucher system to pay for training which is discontinued) were criticised as inaccessible: “It requires HBO+ [i.e. a bachelor degree] digital skills to apply... it didn’t reach the people who needed it most” (education, ACH_O03). Regional models like Opijver [i.e. a regional voucher system] were praised: “It is regional, recognisable, low-threshold, fast, flexible, and collaborative” (education, ACH_O03). Funding should be simple, regionally embedded, and supported by guidance. Blended models - combining municipalities, providers, employers, and social partners - diversify risk and enable integrated pathways. Innovative tools like regional funds or social impact bonds can complement public funding but should avoid short-term metrics. Sustainable infrastructures need flexible, inclusive, and blended funding streams to build resilient lifelong development systems.

4. Improving monitoring

Monitoring should track not only participation but also qualitative and long-term outcomes. “It’s about seeing people, giving them confidence, and

small successes. That cannot be captured in simple numbers” (education, GR_O07). Mixed-methods frameworks combining quantitative data (completion, employment) with qualitative insights (interviews, confidence) are needed. Systems must track learners across providers and funding streams, using shared standards and regional dashboards. “Always keep looking at the situation... show that people are heard” (work, GR_O03). Learners should help define success: “Not thinking for people, but with them. Customisation starts there” (education, GR_O07). Monitoring should drive continuous improvement, not just compliance. “Monitoring should be about learning together, not just ticking boxes” (work, GR_O06). Aligning national and regional systems reduces duplication and fosters collaborative data ecosystems.

5. Strengthening partnerships

“You really need to work together... know each other” (work, GR_O06). Partnerships require formal governance bodies - such as regional councils—enabling joint visioning and resource alignment. “Vision, future-oriented vision... bundling forces... making services complementary to each other” (work, ACH_O02). Informal, trust-based relationships are equally vital, built through co-location and joint activities. “It is about removing worries, being open to questions, showing commitment to help. We must do it together” (work, GR_O03). Pooled funding encourages collaboration over competition. “Too many separate initiatives. Better to have a few excellent providers than twenty mediocre ones” (work, RZ_O07). Involving learners, e.g., as peer ambassadors, ensures interventions reflect lived realities. Strong partnerships blend formal frameworks, relational trust, financial alignment, and adaptive learning cultures.

6. Improving guidance systems

Interviewees stressed the need for long-term, relational learning coaches who build trust, understand holistic needs, and remain involved throughout the learning journey. “It starts with listening, then looking with someone where they would like to take a step. Despite self-direction, someone needs to reach out because it doesn’t come automatically” (welfare, GR_O04). Guidance should be integrated across sectors to avoid fragmented services, with one-stop hubs in accessible locations like libraries or community centres. Proactive engagement is vital: “You shouldn’t say ‘five

streets away there is a course on Wednesday.’ You should say: let’s go together” (welfare, RZ_O08). Strengths-based, trauma-informed approaches are key: “Learning is a basic need. People need to feel heard and seen, not judged or labelled” (work, GR_O02). Guidance staff need ongoing training, manageable caseloads, and supervision to maintain quality.

7. Improving outreach and communication

Outreach must adopt warm, relational approaches, with trusted intermediaries accompanying learners into learning spaces. Communication should focus on opportunity and aspiration, not deficits, and feature relatable role models: “Role models... that works very well with this target group. They are looking for a role model: if it worked for her, then I can do it too” (education, RZ_O06). Outreach should be culturally and linguistically tailored, using community networks, faith groups, local radio, and social media. Peer ambassadors enhance credibility, while practical information - on costs, transport, childcare -reduces barriers. Continuous, multi-contact outreach ensures visibility and builds trust over time. In short, effective outreach combines relational methods, resonant messaging, diverse channels, and consistent presence, moving from passive information to active learner engagement.

Discussion

This discussion addresses the three central research questions, and in doing so, the discussion also reflects on the potential of the applied theoretical and empirical framework (Broek et al., 2024, 2025) as a tool to evaluate local learning infrastructures.

Question 1: Which conditions in local-level learning infrastructures are perceived as insufficient or lacking by organisations with varying intentions?

The study found key weaknesses in the local learning infrastructure: lack of political will, governance, partnership approaches, monitoring, and financial models to support collaboration among organisations helping vulnerable adults. Organisations also struggle with outreach,

communication, and guidance strategies that enable all adults to see learning as valuable, achievable, and motivating.

Question 2: What can these organisations learn from one another to secure more conducive conditions?

The study found that organisations with different dominant intentions - work integration, further learning, and societal integration - can benefit from mutual learning. Work-oriented organisations excel in flexible delivery and stable funding, offering lessons for education and welfare providers facing resource volatility. Education providers stand out in tailored learning provision, providing insights on structuring and assessing programme impact. Welfare organisations, despite systemic challenges in governance and partnerships, have strong expertise in outreach and trusted learning environments, which is especially relevant for organisations relying on referrals rather than active engagement. Cross-sector collaboration can enhance pedagogical support in work-based programmes, improve data systems in welfare settings, and integrate community-based practices into formal education. Together, these synergies create more inclusive, responsive learning infrastructures.

Question 3: What actions can be taken to address weaknesses and strengthen infrastructures supporting vulnerable adults?

The study found that strengthening local learning infrastructures requires coordinated action in seven areas:

1. Institutionalising inclusive governance through cross-sector platforms with clear roles and sustained facilitation.
2. Building political will by aligning lifelong development with broader goals and forming stakeholder coalitions.
3. Moving funding from short-term projects to regionally pooled, multi-year models prioritising accessibility and continuity.
4. Creating integrated monitoring systems, co-designed with learners, to track outcomes and experiences.

5. Establishing trusted partnerships across education, welfare, municipalities, and employers.
6. Strengthening relational guidance via dedicated learning coaches, integrated services, and professional development.
7. Making outreach proactive, culturally sensitive, and trust-based, using peer ambassadors and local networks.

These measures can transform fragmented initiatives into inclusive, resilient infrastructures that support lifelong development and adapt to changing needs.

The study faced several limitations. First, engaging more regions proved difficult due to limited interest or research fatigue. A refined approach, based on these findings, could stimulate interest in the Netherlands and beyond. Second, the study draws only on perspectives of organisational representatives, not adult learners themselves. While learners' reflections are reported elsewhere (Broek, forthcoming), future research could integrate both perspectives to deepen understanding of how to build learning infrastructures for vulnerable adults.

When comparing the results with earlier research, this study shows that not all conditions identified by Broek et al. (2024) and the learning cities literature (e.g. Facer & Buchczyk, 2019b; Yang, 2012) are equally felt in place or seen as important, and patterns emerge in how conditions interrelate. Interviews reveal broad consensus on systemic weaknesses hindering inclusive and sustainable regional learning ecosystems. Across the 29 participants, political will, governance coherence, funding stability, and partnership quality were not just recurring issues but interconnected constraints shaping local initiatives. Political will was often seen as performative - visible in programmes and speeches but lacking sustained leadership or investment. Many interviewees described political support as symbolic or vulnerable to electoral cycles, which reset priorities every four years. Governance was portrayed as fragmented, with limited coordination and local autonomy often undermined by top-down policy shifts or poor strategic alignment across sectors.

A related pattern concerns partnerships and funding. While collaboration is valued, partnerships are often short-term, project-based, and driven by institutional self-interest rather than collective goals. Competition for funding erodes trust and coordination, while the absence of structural financing fosters a “project logic” that limits continuity, innovation, and system learning. Monitoring and evaluation were seen as weak and compliance-oriented, with few shared indicators or collective learning platforms. Guidance and outreach were described as insufficiently tailored to vulnerable groups, fragmented across funding streams, and poorly coordinated at regional level.

Overall, these findings indicate systems marked by fragmented implementation, weak institutional memory, and reliance on individual actors. While local commitment exists, interviewees describe systemic inertia that hinders scaling, sustainability, and inclusivity in adult learning. Addressing these challenges calls for structural reforms beyond individual projects. Interviewees see adult learning as lacking the priority it deserves, both nationally and locally, despite decades of EU and national attention (e.g. Council of the European Union, 2021; European Commission, 2006; Ministerie van Sociale Zaken en Werkgelegenheid & Ministerie van Onderwijs, Cultuur en Wetenschap, 2020).

In relation to the social skills ecosystem approach (Spours, 2024), the Dutch local learning infrastructures examined here score poorly on the key dimensions. Collaborative horizontalities (network-building toward institution-building) are acknowledged but seen as weak. Facilitating verticalities (enabling states and local governments) are undermined by inconsistent political will and continuity. Leadership approaches to support horizontal and vertical interaction are recognised (e.g. Regional Workcentre approaches, the dissolved STAP budget (an individual voucher system to pay for training)) but remain insufficient. Time for systems to evolve is lacking due to political cycles, preventing long-term system building. This study adds a detailed description of how local organisations perceive these conditions and identifies concrete actions needed to advance effective learning infrastructures (or social skills ecosystems).

To conclude, the study also tested an evaluative approach for local learning infrastructures, grounded in theoretical frameworks and methodologies

(Broek et al., 2024, 2025). The approach successfully provided deep insights into what works locally and yielded actionable policy recommendations. It could be further applied to assess other contexts, such as learning cities or regions to stimulate further getting it right together!

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Chapter 6: Exploring card-sorting potential to uncover the interplay between adult learners' motivations and barriers to (start to) learn

Broek, S., Kuijpers, M. A. C. T., Semeijn, J. H., & van der Linden, J. (2025). Exploring card-sorting potential to uncover the interplay between adult learners' motivations and barriers to (start to) learn. *International Journal of Lifelong Education*, 44(3), 330–346. <https://doi.org/10.1080/02601370.2025.2462163>

Abstract

This paper explores the application of the card-sorting interview technique in understanding the complex interplay of motivations and barriers faced by adults engaging in learning. Traditional research methods, whether quantitative or qualitative, often fail to capture these nuanced interactions or to provide scalable insights for policy development. Card-sorting, which involves sorting and reflecting on physical or virtual cards, offers a middle ground by facilitating deeper reflection and quantification. An empirical study with 69 disadvantaged adult learners highlights the advantages of this technique. Card-sorting enables active engagement, response revision, and comfortable discussion about sensitive issues. It promotes ownership of the results and reduces interview duration while maintaining data depth and richness. Additionally, it balances structured analysis with personal expression flexibility and allows for the quantification of response patterns. The study demonstrates that card-sorting can effectively uncover the interplay of factors influencing adult learning decisions, offering actionable insights for policymakers involved in adult learning. Preliminary findings have already attracted significant interest from policymakers, emphasising the need for refined insights to develop more effective support systems. Future research should explore the feasibility of online card-sorting to enhance scalability and participant comfort.

Key words

Card-sorting, adult learning, motivations, barriers, methodology

Sustainable Development Goals

SDG 4: Quality education

SDG 10: Reduced inequalities

Introduction

To progress towards equitable and inclusive societies and labour markets, adults need to have access to lifelong learning opportunities (European Commission, 2017). Many policy interventions have been unable to reach the groups that are difficult to engage in learning as these interventions insufficiently consider adults' motivations, combinations of obstacles and group characteristics (OECD, 2022). This results in policies that widen the gap between those adults that do have access and those that do not (Boeren, 2009). Hence, developing policy interventions that truly contribute to equal access to lifelong learning opportunities requires a deeper analysis of what would stimulate adults to learn and what holds them back from learning.

In the context of this article, adult learning is loosely defined as any organised activity in which the person is learning or developing specific knowledge, skills and attitudes, being associated with pro-actively developing one's qualities to sustainably contribute to society, work, own health and happiness (Kuijpers et al., 2019; Kuijpers & Draaisma, 2020). It can range from following a formal education programme, to literacy training in a library or sheltered work experiences.

Adults' motivations and barriers to learning are studied in both quantitative and qualitative approaches. In quantitative, large-scale survey approaches, respondents have to reflect on the importance of sets of barriers in a sequential order. These answers allow researchers to list the most important barriers adults face in relation to adult learning (see for instance the Adult Education Survey (AES) and Labour Force Survey (LFS)). These surveys identify what people mostly mention as barriers to learning (Cabus et al., 2020; European Commission, 2021; Eurostat, 2022a). However, using the outcomes of quantitative surveys to develop policies can easily lead to interventions not addressing what really holds adults back from learning. An example concerns focusing on financial instruments to increase participation. Quantitative surveys indicate that financial constraints are one of the most selected barriers for engaging in adult learning (in the 2022 Adult Education Survey, it is the third most selected barrier with 13.4% of respondents (aged 25-69) wanting to learn selecting it (Eurostat, 2024)). Interventions that solely aim to remove this barrier (such as individual

learning accounts and learning voucher systems) have to be ineffective in engaging adults in learning when they are not already motivated to learn (Bussink & Ter Weel, 2023; Tomini et al., 2016). Furthermore, evaluation and studies on these schemes report high levels of deadweight loss and pre-selection of higher educated learners (Bussink & Ter Weel, 2023; Tomini et al., 2016). On the other hand, qualitative studies take a more individual, life-course perspective in looking at what holds adults back from learning (Brady & Gilligan, 2020; Field & Lynch, 2015) but face challenges in identifying common patterns or informing policy development beyond individually tailored interventions. While both quantitative and qualitative research approaches have their benefits, on their own they seem to result in poorly evidenced-based policy interventions unable to fully address the multitude of barriers adults face to start learning. It is therefore important that to develop equitable and inclusive societies and labour markets (European Commission, 2017), a multiple interacting factor approach is needed find out what could motivate the 79.5% of adults (aged 18 to 69 years) that indicate that they do not learn and do not want to (Eurostat, 2022b).

A research approach that allows researching multiple interacting factors is card-sorting. In most cases, card-sorting is a synchronous (mostly face-to-face, but also online) exercise in which the interviewee is given physical cards to sort (Gravlee et al., 2018; Jindal, 2020). The basic purpose of sorting is to identify how participants think about which items go together in a category and why (Barton, 2015). In this, interviewees do not need to answer questions in a sequential order, but can go back to their earlier provided answer (sorting a card) and revise their decision based on their reflections caused by a new card. Through this, the card-sorting interview technique allows for the interactive review of items, facilitating deeper metacognitive reflections, active participation, and ownership of results by interviewees (Conrad & Tucker, 2019; Lobinger & Brantner, 2020). Furthermore, it eases discomfort in discussing sensitive issues (Saunders & Thornhill, 2011; Sutton, 2011), reduces interview duration and maintains engagement, all the while enabling both qualitative and quantitative analysis of response patterns (Brent et al., 2021; Cataldo et al., 1970). Card-sorting can bridge the gap between qualitative and quantitative techniques (Rugg & McGeorge, 2005). Some practices show-case a high level of quantification and

quantifiable results. This is, for instance, illustrated by Cataldo (Cataldo et al., 1970) who applied a card-sort in a large-scale survey, allowing quantitative analysis while at the same time using qualitative think-aloud process (Conrad & Tucker, 2019).

While card-sorting is used in different disciplines, such as psychology (Hammond & O'Rourke, 2007), information architecture and usability research (Cayola & Macías, 2018; Paea & Baird, 2018), and political sciences (Cataldo et al., 1970), it has never been used in adult learning to explore the patterns behind decisions whether to learn or not. There are many quantitative and qualitative studies focusing on barriers for adult learning (amongst others Boeren, 2016; Kondrup, 2015; Rubenson, 2018). To illustrate the potential added value of applying card-sorting, two studies on the same theme are briefly discussed below. One represents a quantitative study where, microdata from the European Union Labour Force Survey (EU-LFS) is analysed to understand the multilayered problem of adults non-participation in learning (Cabus et al., 2020), the other represents a qualitative study based on a small set of in-depth interviews with adult learners on what held them back from learning (Field & Lynch, 2015). Cabus et al. work on 'Multi-layered perspective on the barriers to learning participation of disadvantaged adults' (Cabus et al., 2020), in line with seeing adult participation as a layered problem (Boeren, 2017), developed a multi-level explanatory model to explain the variability behind participation in adult learning. As empirical basis the EU-LFS 2016 was used, covering 31 European countries. The analyses result in conclusions which are necessarily rather general such as that employees participate more often in adult learning when the employer pays for it, that costs provide a barrier for low-educated employees and for low-educated young adults, that overqualified individuals are more likely to participate in adult learning, and finally that household-related barriers play a substantially more important role if one is under 30 and low-educated. While being interesting findings, these do not provide insights in how different factors interact and why. Field and Lynch's qualitative work on 'Getting stuck, becoming unstuck: Agency, identity and transitions between learning contexts' (Field & Lynch, 2015), analysed life histories of eight adult learners. Their article concludes that the phenomenon of 'stuckness' is a complex interplay of internal dispositions and external factors, both of

which are intricately intertwined and mutually reinforcing, manifesting across various dimensions of individuals' lives and experiences. While this study does stress the interplay of factors, it does not allow any quantification, making claims that go beyond the sample to draw clear lessons for policy development to better support adults in vulnerable positions.

Card-sorting could be used to combine quantitative (understanding what) and qualitative (understanding how and why) approaches in the field of adult learning. By prompting deeper reflections from interviewees and revealing the interplay of barriers (unlike purely quantitative research), and by allowing for some quantification and scaling-up (unlike other qualitative approaches), this method has the potential to address the research gap. It could serve as a bridge between qualitative and quantitative research approaches in the field of adult learning and inform policy development. Therefore, this article explores the potential of card-sorting and aims to determine how this specific qualitative interview technique can be supportive to better understand the interplay between stimulating and hindering factors for adults to learn and through this, to support developing effective policies. Hence, the article focuses on the following research questions, *what is the added value of the card-sorting methodology in understanding the process of encouraging lifelong learning, which conditions are needed in the use of the card-sorting methodology and finally, what type of insights can be obtained by this method on the interplay of stimulating and hindering factors for adults to learn?*

The card-sort was developed based on a theoretical framework on stimulating and hindering factors for adults to engage in learning, based on a capability approach (Sen, 1999). The capability approach was selected to revert from the idea that adults non-participation in learning can be fully explained in terms of removable barriers and that adults have a natural desire to learn. Instead the capability approach asks the question whether adults are in the position to value adult learning and whether they have the freedom to choose adult learning as valuable to achieve (Boyadjieva & Ilieva-Trichkova, 2021; Robeyns, 2017).

Through taking this approach, factors were identified that can influence whether adults see learning as a valuable choice or not. Based on literature review (Broek et al., 2023), a distinction is made between ‘agency-related’ factors (i.e. those related to a person’s self-determination, self-efficacy, autonomy and competence to value learning), ‘conversion-related factors’ (i.e. all kinds of abilities to convert resources, commodities, or inputs for capabilities into actual actions (‘doings’)), and finally a ‘contingency-related factor’ (i.e. specific life events). This resulted in the following list of factors (Broek et al., 2023), differentiating between agency-related factors (number 1-3), conversion-related factors (4-11) and a contingency-related factor (number 12):

1. **Aspiration and Forethought:** This is about setting future goals and aspirations, and acting with future events in mind.
2. **Competency and Confidence:** This concerns whether adults feel capable and confident in their learning abilities.
3. **Reflectiveness:** This involves self-reflection and taking ownership of personal development.
4. **Institutional Conversion Factors:** Institutions like schools, libraries, and employment agencies can influence learning.
5. **Social Conversion Factors:** Social contacts and networks impact learning motivation.
6. **Familial Conversion Factors:** Family can encourage or hinder learning.
7. **Economic Conversion Factors:** The financial situation impacts learning opportunities.
8. **Cultural Conversion Factors:** Cultural norms and practices affect learning motivation
9. **Political Conversion Factors:** Political developments had limited influence on learning motivation.
10. **Educational Conversion Factors:** Educational background influenced attitudes toward learning. Negative school experiences,

such as bullying, reduced motivation, while positive experiences and self-confidence can boost it.

11. **Employment Conversion Factors:** Work environments varied in their support for learning. Some employers encourage learning through support and recognition, while others do not.
12. **Life Events:** Personal experiences and life events, such as loss, job changes, or moving to a new country, can stimulate and hinder learning and personal development.

Method

To explore the potential of card-sorting in the field of adult learning an empirical field study using the card-sorting interview technique was carried out under 69 adults in three regions in the Netherlands that started learning from a disadvantaged position.⁴

Participants

The 69 interviewees belong to the group that is known to be underrepresented in lifelong learning, coming from backgrounds that in literature are considered to be vulnerable or disadvantaged (i.e. limited initial education and training; socio-economic disadvantaged background; from a minority/migrant background; without sustainable employment) (Panteia, 2019). In spite of this, they successfully made the transition from not learning to learning. This approach was taken to gather stories about successful transitions of individuals from not learning to learning in a life-course perspective (Brent et al., 2021; Field & Lynch, 2015; Mayer, 2009).

The interviewees were identified through intermediary organisations in three regions in the Netherlands (Rotterdam, Groningen and Achterhoek) accompanied by a number of initial test interviews in the cities of Utrecht,

⁴ NB: This study is part of a larger research project funded by the Netherlands Initiative for Education Research (NRO), project title 'Fostering Learning! A development oriented monitor for more lifelong development (LLD) through improved self-direction'. The full analysis of the data is foreseen to be presented in a forthcoming article. While the current article focuses on the methodological aspects, the content-related analysis only serves to illustrate the potential of card-sorting.

Heerlen and Hengelo. The test interviews were included in the final sample as only minimal changes were made to the approach. The selection approach allowed to arrive at a sample of interviewees living in different rural and urban contexts. The intermediary organisations were (semi-) governmental organisations (e.g. municipalities, Public Employment Services), education providers (e.g. VET-colleges, language training providers), libraries, labour market re-integration offices (e.g. sheltered workshops, learning-working companies), and well-fare organisations (e.g. neighbourhood houses, social NGO's).

Table 4 provides an overview of the number of interviewees per region, type of organisation and type of adult learning activity. The sample represents a wide variety of positions disadvantaged adult learners are in, looking at language courses for migrants, Dutch as first language, civic integration, social inclusion, labour market oriented training and formal adult education.

Table 4: Overview interviewees per region, learning in type of organisation and age groups, employment status, migration background, and gender.

Characteristics regions	Region		Achterhoek	Rotterdam-Zuid	Groningen	Other regions	TOTAL
	Geographical orientation		East	West	North	East/South	
	Urban/rural		Rural	Urban	Urban/rural	Urban/rural	
	Total		18	24	14	13	69
Learning in type of organisation	Work	9	9	0	2	20	
	Education sector	3	6	4	4	17	
	Wellfare organisation	0	2	10	0	12	
	Library	0	3	0	4	7	
	Language provider	6	4	0	3	13	
Characteristics participants	Age groups	30-	1	4	0	0	5
		31-50	10	15	8	9	42
		51-65	4	4	5	1	14
		66+	3	1	1	3	8
	Background	Dutch	14	7	10	10	41
		Migrant	4	17	4	3	28
		Not in work	2	5	4	3	14

	Employment status	Supported work / apprenticeship / Education pathway	10	17	10	4	41
		Inbetween jobs/ precarious work situation	3	1	0	3	7
		Retired	3	1	0	3	7
	Gender	Male	5	11	2	6	24
		Female	13	13	12	7	45
		Prefer not to be classified	0	0	0	0	0

The recruitment of adult learners for interviews followed a staged approach. Initially, contact was made with regional organisations, such as municipalities and regional labour market bureaus, that serve the target groups. These organisations were then requested to facilitate interviews with two to three adult learners each. Typically, the organisations arranged the interviews, with direct contact between the researcher and participants occurring only in a few cases.

Before commencing each interview, participants were provided with an information note outlining the study's purpose and their rights, including that they participate voluntarily. They were also required to sign a consent form. The study design received approval from the ethical commission of the Open Universiteit of the Netherlands. In line with the ethical guidelines, the data is stored and analysed in anonymised form only.



























Card-sorting instrument applied

The interviews were designed as a conversation in which, in a semi-structured way, insights were obtained into the interviewee's learning and development story, the choices they made and the factors that influenced them. Each interview covered four parts. Firstly, each interview started with an exploration of the interviewees' background, experience with learning and work and what recent learning activity the interviewee engaged in. This recent learning activity was further explored in terms of what type of learning this concerned (formal, non-formal, informal) and when and where it took place. Secondly, the interviewee was asked about the benefits and results of the learning activity the interviewee engaged in recently. Thirdly, the interviewee was asked to reflect on factors that stimulated or hampered

engaging in the recent learning activity. Fourthly; the interviewee was asked to reflect on what policy intervention can better support individuals in similar situations. In step 3 and 4, the card-sorting technique was applied. The interview process was structured in this way to ensure that the interview started with a seemingly more easy and less confrontational exercise, namely firstly to tell in their own words their background and secondly discuss the benefits the learning. This then allowed the interviewee to get accustomed to the interview and could in step 3 and 4 explore the stimulating and hindering factors for learning.

For each of the twelve stimulating and hindering factors, based on the theoretical framework (Broek et al., 2023) a card was developed. A thirteenth 'other' card was added to allow other suggested factors to be included. The cards both contained a short explanatory text and a representative image, to also cater to adults with limited linguistic capacities or linguistic skills in another language (Čanigová, 2022). The playing field and cards were writable so that the interviewee (or interviewer) was able to also note additional thoughts/relationships themselves. A round of initial test interviews (four interviews) revealed that some cards were linguistically challenging and as a result the language was simplified (for instance 'financial situation' to 'money'). Figure 2 shows the cards and the 'playing field' as used during the interviews.

Figure 2: Card-sorting interview set-up for discussing stimulating and hindering factors for adult learning (translated into English from Dutch). NB: Cards are enlarged in comparing to the playing boards to increase readability.

 Aspirations and knowledge		 Work / volunteering																																																																						
 Competency and Confidence		 Life events																																																																						
 Reflectiveness		Other, namely																																																																						
<div style="display: flex; justify-content: space-around; align-items: center;"> <div style="border: 1px solid black; padding: 10px; width: 45%; text-align: center;"> <p style="color: orange; border: 1px solid orange; border-radius: 50%; padding: 5px;">What held me back from learning?</p> </div> <div style="border: 1px solid black; padding: 10px; width: 45%; text-align: center;"> <p style="color: green; border: 1px solid green; border-radius: 50%; padding: 5px;">What motivated me to learn?</p> </div> </div>																																																																								
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Interview process

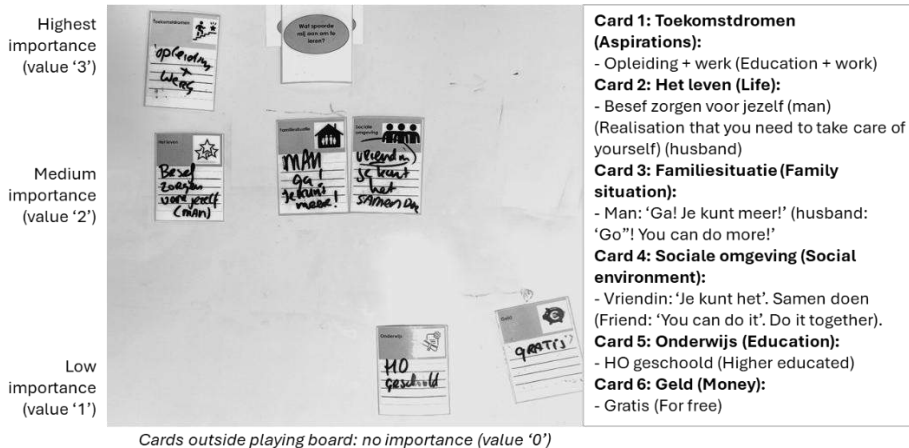
Interviews were predominantly conducted at the premises of the participating organisations, with only a few exceptions taking place in the participants' homes or neutral locations like local libraries. The interviews were conducted face-to-face between October 2022 and January 2024 and lasted between 30 and 90 minutes. The interview team consisted of three interviewers who conducted the first three interviews together to develop a common approach to ensure consistency in qualitative data collection. After these initial interviews, the members conducted interviews alone. The team regularly consulted each other on progress and challenges (Patton & Patton, 2002).

The interviewer played an active role during the sessions. This involved reading aloud the text on each card, providing additional explanations, and suggesting cards that matched the topics discussed by the adult learners. The checklist included questions designed to prompt reflections on the placement of the cards on the board. For interviewees with limited linguistic abilities or Dutch language skills, a simplified life-course approach was used: the interviewer linked the participants' life stories to the cards and sought validation from the participants regarding the placement of the cards on the board.

The card-sorting technique was applied in the part of the interview that focused on factors that stimulated or hampered engaging in the recent learning activity. It allowed the interviewees to position the cards to their own liking, re-shift them once more important factors emerge and review the final laying of cards.

Each interview was audio-recorded, and photographs were taken of the final arrangement of cards on the board (see examples in Figure 3). The pictures show how adult learners position the cards and make choices concerning their priority and their clustering. It also shows that additional information is written on the cards.

Figure 3: Illustration of a playing field and factors cards (picture taken after the interviewee finalised laying and re-shifting cards) (Participant: RZ_O12_I02)



The recordings of interviews and the transcripts allowed to collect spoken reflections on the card-sorting method. This included for instance, doubts on where to put a card on the board or the questions asked by interviewees on the process. Furthermore, after the card-sort, the interviewer asked the interviewee to reflect on the added value of the card-sorting technique and to identify conditions for successful application of card-sorting.

Analyses

The interviews were transcribed and qualitatively analysed using Atlas TI and PSPP (a statistical analysis tool developed as a free, open-source alternative to SPSS) for creating a quantitative analysis of the mapping of specific factors (and excel for developing the graphs). Based on the transcripts, reflections on the card-sorting method were coded and analysed. For obtaining insights in how card-sorting supports gaining insights into the interplay of factors, a mix of thematic analysis (Braun & Clarke, 2006) and grounded theory analysis (Glaser et al., 1968) was applied. This allowed analyses on how interviewees use concepts from a pre-developed theory, namely the developed theoretical framework inspired by the capability approach (Broek et al., 2023) (deductive qualitative analysis) and we analysed the relationships between the different concepts in order to arrive at patterns helping us understand the

interplay of factors that stimulate and hinder adults to learn (quantitative analysis).

Results

To prepare answering the research question (what is the added value of the card-sorting methodology, which conditions are needed in the use of the card-sorting methodology and what type of content-related insights can be obtained by this method?), this section presents how the card-sorting technique worked in practice; what is needed to make a card-sorting methodology effective in the field of adult learning; and finally, what type of insights can be obtained through the card-sorting method that are helpful in understanding the interplay between stimulating and hindering factors.

How does card-sorting work in practice – what is the added value?

Concerning the process of card-sorting and how interviewees handled the cards, the interviewees followed different approaches. This ranged from a more structured approach to a loosely associative approach. Some participants preferred the interviewer to first read the cards aloud and provide additional explanation before they took at hand any of the cards. Other participants immediately started discussing the cards when hearing the explanation and positioned the cards directly on the board.

How interviewees worked with the cards related to their acceptance of the approach. Some participants (around one in ten) had initial resistance to working with the cards as it felt complicated to them. They often found it hard to lay down the first card, as it was not clear to them whether the card presented an important factor or not. Once the first card was laid down, the participants were better able to position cards based on the relative importance. The majority however, was generally supporting and even enthusiastic about the approach. One participant even indicated that “you could turn this into a board game for learners in school” (TEST01). Another illustration of the acceptance was that a participant complimented the interviewer with the interesting interview format: “I find the working method very pleasant. I think, yes, it actually works very well” (TEST06).

Participants generally appreciated that the interview allowed them to reconstruct their own story in a structured manner. A card presenting a

more important factor would naturally be placed higher than an already placed card. Through this, the participants already started their own analysis, as can be illustrated by a quote “I found that one [pointing to a card positioned on the board] quite okay too, but I think it's slightly less important [shifting it slightly lower]” (Ach_O01_I01). Many interviewees got active in shifting the cards while laying the cards, but also at the end when the interviewer asked whether the participant is ok with how the cards are positioned or whether he/she would like to change. Often participants used this opportunity to make slight changes while telling their reconstructed story, as can be illustrated with the following quote: “these cards [touch two cards] play a role... maybe a bit lower... Ok, and this one [touch another card] does not help. I'll put it a bit lower” (Ach_O02_I04). The participants clearly see connections between the various factors and that factors influence each other in providing a simulating or hindering environment for learning. Yet, another illustration highlights that each participant can develop the own story: "Yes, during the conversation, you come to realise a bit that there are things that fit with me. And another person might find completely different things important. That's the beauty of it" (TEST02).

Related to developing the own story, the card-sort also evoked reflection on the own narrative as often the initial 'life story' as presented at the start of the interview appeared to be rather different from the final reconstructed story. In this context, an interesting factor card that often steered up the story was 'life' (any contingencies that triggered the need to learn). For participants in a disadvantageous position it is often the realisation (self-reflection) caused by a life-event, that makes them realise that their life is actually not supporting their implicit/explicit aspirations. The interviews contain plenty of illustrations related to health, parents passing away, job loss, etc. Sometimes it is a realisation about what kind of parent they want to be for their (future) children, as illustrated by the following quote: “By the way, this [life-card] could also include a wish for paternity. Yeah, I did not discuss that. I had a girl and we had an abortion, mainly because I didn't have my own life in order. That was actually a very negative experience, which became very motivating to change. The stomach perforation on that card [life-card] literally says: I don't want to die in pain. Then follows the dreams of the future [aspirations]. Still, I want to build something healthy of myself, build something nice of myself” (RZ_O07_I04). Another participants

when reflecting on the card-sorting activity clearly stated that it helped to self-reflect: “It ensures a certain neutrality in my opinion, and I think that’s quite strong about it. No, and I think it’s really cool that this research exists. I think, well, I notice, ... It also helps me reflect” (TEST06). Some participants asked if they could receive the photos taken from the board and the cards as they found it capturing their own story very well.

In sum, while acceptance of using card-sorting among interviewees varied, with some initial resistance of a small number of interviewees due to perceived complexity, the large majority of interviewees found the method engaging and insightful, often restructuring their narratives through the activity. The process encouraged self-reflection and a deeper understanding of personal factors influencing learning, highlighting the value of this interactive method for capturing individual stories and insights.

What conditions need to be in place to effectively use card-sorting in adult learning?

While the learners’ reflections are generally appreciative to the card-sorting method, it is not a straightforward exercise that is easy to use with all adult learners. In this results section, some challenges and conditions for effective application of card-sorting are discussed.

First, the role of the interviewer is a key factor in the effective application of card-sorting. As the participants are asked to discuss their personal stories, which include as well discussing trauma’s, the interviewer had to invest in building trust by being an attentive listener. Furthermore, as some the participants drifted away in their story, the interviewer had to keep referring back to the board and the cards, seeking to link the elements of the story to specific cards and asking to verify those links. All in all, card-sorting calls for an active participation of the interviewer in the conversation, while at the same time maintaining a neutral stance to what is said by the participant.

Second, the card-sorting method had to be able to deal with diversity and had to leave room for personalisation. The learners participating in the interviews consisted of a large variety of adults in terms of age, educational background, social background, economic background, cultural background and they participated (or previously participated) in a variety of learning and/or development programmes (see as well Table 4). To deal with

this diversity, the first part of the interview tried to capture the above aspects of the adult learner in a semi-structured way. This part of the interview also aimed to identify the learning or development activity that the interview will focus on. This was often the course of development activity the participant was currently engaged in, or in some cases an earlier course of activity. For a few participants it appeared difficult to identify this activity. For instance, a female participant indicated "I am 37, to start learning now and whatever? No" (TEST09). She did not realise that she was learning and developing during her supported work in a school. During the interview, she realized that she clearly developed her self-confidence, self-esteem and autonomy: "I have really changed a lot since I started working here [...]. I feel like I have become stronger by working here" (TEST09). The interview then focused on the learning and development that took place through working in the school. Keeping a semi-structured and open approach allowed for dealing with diversity and let participants mold their stories within the structures provided by the card-sorting method.

In sum, card-sorting can effectively be applied in adult learning when interviewers actively build trust, listen attentively, and guide participants back to the cards. The method needs to accommodate diverse backgrounds and allow for personalisation.

What type of insights can be obtained through card-sorting on stimulating and hindering factors?

The interviews result both in rich qualitative descriptions of how learners reflect on the different stimulating and hindering factors for learning, and in overviews (photo's) of how the cards are placed on the board. This allows both an analysis of the qualitative data as well as a quantitative analysis of how the different cards are positioned and which priority specific factors received. In this final part of the results section, we illustrate what type of insights can be obtained through the card-sorting method that are helpful in understanding the interplay between stimulating and hindering factors. We firstly present what quantitative analysis is possible to conduct and secondly illustrate how qualitative data can enrich this quantitative analysis. In line with the focus of this Special Issue (i.e. focus on conceptual and methodological issues in participation), the analysis is limited to illustrate what analyses the data obtained through card-sorting allows. A

full analysis of the obtained data is foreseen to be presented in a separate article.

Card-sorting supports understanding what stimulates and hinders adults to learn (quantitative approach)

To illustrate that card-sorting allows to analyse the interplay of stimulating and hindering factors, a co-occurrence analysis was conducted (see Table 5), analysing counts of co-occurring entities (i.e. factors) within a collection of data (Zhou et al., 2022). The co-occurrence is calculated by indicating for each possible combination of two factors the percentage participants indicating that both factors were stimulating, both factors were hindering, or whether one factors was hindering and the other stimulating. The analysis shows that there is never a single most important factor, but always a tangle of factors at play. On average, the 69 interviewees, reflecting on 12 pre-identified factors (see Method section), mentioned 5.8 factors as stimulating them to learn (range from 1 to 11) and 2.8 factors as hindering them to learn (range from 0 to 7). As is evident from Table 5, many factors co-occur in combination as regards to stimulating (green-shaded), hindering (red-shaded), or a combination of stimulating and hindering (orange-shaded). The interviewed adult learners also recognised that factors often are related.

Table 5: Co-occurrence of stimulating and hindering factors for adults to engage in learning (n=69)

		1	2	3	4	5	6	7	8	9	10	11	12
1. Aspiration and Forethought	Hindering	86%	6%										
	Stimulating	6%	86%										
2. Competency and Confidence	Hindering	41%	3%	46%									
	Stimulating	58%	3%	64%	46%								
3. Reflectiveness	Hindering	20%	1%	12%	19%	25%							
	Stimulating	61%	6%	54%	30%	70%	25%						
4. Institutional Conversion Factors	Hindering	23%	0%	19%	7%	17%	6%						
	Stimulating	62%	4%	68%	20%	52%	17%	21%					
5. Social Conversion Factors	Hindering	17%	1%	16%	6%	14%	4%	13%	7%				
	Stimulating	57%	4%	38%	35%	45%	19%	51%	17%	67%			
6. Familial Conversion Factors	Hindering	38%	1%	33%	22%	28%	13%	28%	10%	25%	13%		
	Stimulating	48%	4%	32%	28%	42%	16%	45%	13%	45%	9%	57%	43%
7. Economic Conversion Factors	Hindering	28%	3%	22%	19%	28%	4%	22%	12%	26%	4%	17%	14%
	Stimulating	28%	0%	20%	13%	22%	7%	20%	7%	23%	3%	14%	16%
8. Cultural Conversion Factors	Hindering	26%	0%	19%	19%	23%	9%	23%	4%	19%	7%	19%	16%
	Stimulating	23%	3%	20%	9%	22%	6%	19%	9%	17%	10%	16%	13%
9. Political Conversion Factors	Hindering	4%	0%	4%	4%	3%	3%	4%	0%	3%	1%	1%	6%
	Stimulating	22%	0%	16%	13%	17%	9%	17%	10%	19%	4%	12%	10%
10. Educational Conversion Factors	Hindering	19%	3%	13%	17%	19%	7%	17%	4%	17%	4%	13%	13%
	Stimulating	33%	3%	29%	14%	30%	9%	26%	12%	25%	12%	25%	19%
11. Employment Conversion Factors	Hindering	16%	1%	13%	10%	12%	7%	12%	3%	13%	6%	7%	14%
	Stimulating	46%	3%	30%	28%	39%	13%	39%	17%	38%	16%	32%	20%
12. Life Events	Hindering	12%	0%	10%	4%	10%	1%	9%	6%	7%	6%	9%	1%
	Stimulating	52%	3%	33%	36%	42%	16%	42%	12%	42%	12%	35%	26%

To illustrate how card-sorting could facilitate the development of groupings of learners, based on their patterns of stimulating and hindering agency and

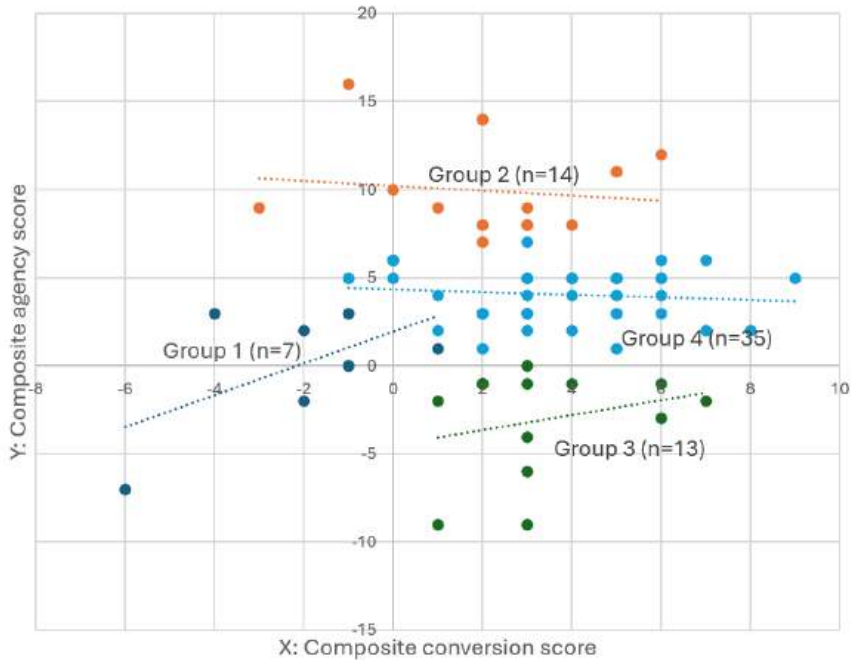
conversion factors, a k-means cluster analysis was conducted⁵. K-means cluster analysis is a simple and intuitive method to explore the data and allows to group similar data points together into a set number of clusters, so that points in the same group are more alike each other than to those in other groups. It does this by finding central points (centroids) for each cluster and assigning each data point to the nearest centroid, adjusting the centroids until they best represent the data. For agency factors (aspiration, competency and confidence, reflectiveness), conversion factors (institutional, social, family etc.), and life events a composite score was calculated whereby the most important factors received a value of '3', the second important factors a value '2', the least important factors a value '1' and those factors that did not play a role a value '0'. We employed k-means clustering with k set to 4 (identified through the Elbow method), using standardized values of the agency conversion, and life events composite score.

The k-means cluster analysis revealed four distinct clusters. Cluster 1 is characterised by a low agency composite score (-2.14) and conversion composite score (0.00) and a high life event score (1.86), while cluster 2 shows a medium agency composite score (2.00) and high conversion composite score (9.86) and a high life event score (1.21). Cluster 3 has a high agency composite score (3.38), a low conversion composite score (-3.08) and a low life event score (-0.08), and finally, cluster 4 shows a high agency composite score (3.71) and medium conversion score (4.06) and a medium life event score (0.94). To determine if the clusters significantly differ, we conducted ANOVA tests for each variable. The results indicate significant differences across clusters for the agency composite score ($F(3, 65) = 18.54, p < 0.001$) and conversion composite score ($F(3, 65) = 69.89, < 0.001$) and life events score ($F(3,65) = 2.89, p < 0.042$). We conducted a follow-up analysis using Tukey's HSD to explore the differences in performance across the four groups (with $p < .05$). The test identified significant differences for agency between group 1 and 4, 2 and 4, and 3 and 4. For conversion significant differences were identified for groups 1 and 2,

⁵ Besides a k-means cluster analysis, alternatively clusters were developed based on whether the interviewees had either a positive or negative score on the two dimensions (agency and conversion). This clustering however led to uneven clusters, with 61% falling in the cluster of positive scores on both agency and conversion.

1 and 3, 2 and 3, 2 and 4, and 3 and 4. For life events significant differences were identified for group 1 and 2 only⁶. *Figure 4* shows the outcomes of the cluster analysis, presenting the distribution of the four clusters of adult learners for two variables (agency and conversion).

Figure 4 K-means clustering of interviewees, presenting two of the three variables (agency and conversion) (N=69)



Card-sorting support understanding how factors stimulate and hinder adults to learn (qualitative approach)

While the quantitative analysis allows to see co-occurrences and develop clustering into groups, the qualitative data allows to further enrich the insights into what specific stimulating and hindering factors play a role and what policy interventions could be taken to best support individuals that have similar patterns of stimulating and hindering factors. To illustrate this,

⁶ In the supplementary materials annex the outcomes of the ANOVA and HSD TUKEY tests are presented in tabular format (Table 6, Table 7, Table 8).

an analysis for one cluster of learners is presented (NB. a full analysis covering all clusters will be presented in a forthcoming article).

Cluster 1 consists of seven learners that have both a low level of stimulating agency (average -2.14) and conversion factors (average 0.00) in place, and a high life event score (1.86). In terms of stimulating factors, one of the most recurring themes is the importance of encouragement from others. As illustrated by a quote, "the trust that others had in me played a significant role" (TEST09). This external belief often compensates for the learners' lack of self-confidence, suggesting that external validation can be a powerful motivator. Furthermore, many learners included in cluster 1 emphasised the need for financial and time resources to engage in learning. As one interviewee highlighted, "more money and time are crucial" (TEST05). Furthermore, life events often act as powerful triggers for adults in vulnerable positions to engage in learning. These moments—whether joyful, challenging, or deeply transformative—can shift perspectives and motivate individuals to seek growth and self-improvement. For some, the birth of a child provides a profound reason to invest in education, driven by the desire to create a better future. One participant reflected, "The birth of my child gave me the push to think beyond myself and focus on building something meaningful" (Ach_O01_I01). These events often instil a sense of urgency and clarity, helping individuals overcome barriers such as financial struggles or self-doubt. As one interviewee stated, "At a certain point, you realise you want to leave something meaningful behind for your children" (RZ_O07_I02).

In terms of hindering factors, a pervasive hindrance for learners in cluster 1 is the learners' self-doubt. One participant reflected, "The fact that I think I can't do it... I lacked the confidence" (TEST09). This lack of self-belief can be paralyzing, preventing learners from even attempting to engage in educational activities. Another major barrier is financial insecurity. One interviewee expressed concern about the financial risks involved in pursuing education, stating, "Can I afford to invest in something with an uncertain outcome?" (TEST05). This highlights the need for financial safety nets to encourage learning. Past experiences also play a role in shaping current attitudes towards learning. An interviewee from an older generation noted, "I had to work at fourteen, and further education wasn't an option"

(Ach_O04_I03). Such experiences can create long-standing barriers to re-engaging with education later in life. The interrelationship between these factors is evident. Encouragement can mitigate self-doubt, financial support can reduce the fear of economic risk, and practical benefits can enhance the perceived relevance of learning. Conversely, lack of confidence can amplify financial concerns, and negative past experiences can undermine the potential positive impact of support and incentives.

When overseeing the final results of the individual card-sort, the interviewees were also encouraged to propose policy recommendations to support adults in similar situations as themselves in beginning their learning journeys. To better support adults in vulnerable positions, policymakers should focus on addressing financial barriers, fostering self-confidence, and ensuring tailored guidance and opportunities for personal development. Financial constraints remain a significant hurdle, as one participant noted: "Time and money must be made available for learning; otherwise, it's hard to see the direct benefit" (Interview 05). Offering accessible financial support mechanisms, such as learning vouchers, can provide tangible incentives for adults to invest in their education without fearing uncertain outcomes. Equally important is building trust and self-confidence. Many adults doubt their abilities, and external encouragement can play a transformative role. As one learner explained, "If others truly believe you can do it, you start to believe it too" (Interview 09). Policies should prioritise mentorship programmes and create supportive environments where learners feel valued and capable. Thus, building strong support networks involving job coaches, mentors, and encouraging workplace cultures can significantly boost adult learners' confidence and motivation. Additionally, the importance of flexibility in policy design cannot be overstated. Programmes must be adaptable to individual needs and life situations. One participant emphasised: "The focus should be on what someone truly wants to achieve, not just fitting them into an existing system" (RZ_O07_I02). In this respect, interviewees see employers' investments often as a means to bind them to the work (that they do not aspire) and question the intentions of employers and sometimes public employment services. Providing what is close to what the individuals really want can be more motivational. All in all, the interviews in this cluster reveal

that policies must address financial barriers, foster self-belief, and ensure personalised, flexible support systems to enable meaningful and sustainable adult learning outcomes. Addressing self-doubt and negative past experiences is equally important in overcoming barriers to education. This nuanced understanding can inform policymakers aiming to create more effective adult learning programmes.

In sum, as illustrated for one group of interviewees (cluster 1), this qualitative analysis of data obtained through card-sorting allows to describe how individuals are stimulated and hindered by different factors while maintaining a holistic perspective on the complexity of factors at play. The card-sorting methodology brings the interrelationships between factors out in a more in-depth way compared to more simple semi-structured interviews. It also allows to identify policy recommendations that are targeted to individuals, not based on their background characteristics, but on the patterns of stimulating and hindering factors.

Discussion

Our study illustrates that the card-sorting methodology applied in the analysis of adult learning barriers and motivation yield considerable benefits compared to other research techniques (both qualitative and quantitative methods) as it allows to thematise better the interplay between different factors in explaining why specific groups of adults learn (or do not learn). For instance for one cluster of adult learners analysed, a delicate interplay of financial opportunities, self-confidence challenges and flexible support allowed the learners to start learning. Thus, it points to policy recommendations that more specifically address the full interplay of factors. In this sense, the card-sorting method can be helpful to complement and enrich the existing literature on adult learning barriers and motivations. The aim of this article was not to provide a full and detailed analysis of the different groups of adult learners, but to illustrate what type of insights could be gathered through the card-sorting methodology. The adult learning-related results will be further explored in a forthcoming article.

Not only looking at the results, also from a methodological perspective card-sorting can be an added value in complementing existing research tools. The card-sorting approach as tested in the adult learning pilot study among 69 interviewees revealed a number of advantages compared to other qualitative research techniques.

Firstly, it allowed interviewees to review stimulating and hindering factors in their interaction and allowed revisions of decisions taken during the interview. Many times the interviewees re-shifted the cards at the end of the interview when validating their reconstructed story. This advantage is confirmed in other card-sorting studies (Cataldo et al., 1970; Conrad & Tucker, 2019). In this sense, card-sorting is closer to a more common thought process than a linear process whereby an interviewee needs to complete its thought on a specific item at once (Sutton, 2011).

Secondly, card-sorting encouraged ownership for the results at the side of the interviewees and allowed a more active participation. This was also shown by the fact that interviewees summarized their own story by reviewing the final laying of the cards and even asked for the photo of the playing boards as they found it an interesting summary of their own story. Literature on card-sorting acknowledges this advantage indicating that card-sorting evokes a thought process at the side of the interviewee. This thought process allows the interview to go deeper into mental states of the interviewees and interviewees to take ownership of the final results of how the cards are positioned. The card-sort is less a passive replying to answers of the interviewer, but more an active recapturing of the thought process by the interviewee (Lobinger & Brantner, 2020). Card-sorting allows deeper, metacognitive reflections by interviewees (Conrad & Tucker, 2019).

Thirdly, the card-sorting eased discomfort under the interviewees and allowed discussing sensitive and personal issues. It allowed the adult learners to talk about many unpleasant life experiences (sickness, economic challenges, bad childhood situations, war) but gave the interviewees the opportunity to physically put these negative (important) cards at the playing board and take up another card to reflect on. This advantage is also well covered in existing literature in the sense that card-sorting allows interviewees to objectivise sensitive and personal issues and

enables them to discuss them without being (too) emotional (Saunders & Thornhill, 2011; Sutton, 2011). This is even further supported when the cards use visuals such as graphic imagines (Čanigová, 2022).

Fourthly, card-sorting reduced the interview duration and repetitious questioning. In this study, the interviews took between 30 and 90 minutes, but despite the difference in duration, in all interviews all twelve factor cards were discussed. Obviously, the longer the interview the richer the (qualitative) data, but still the shorter interviews allow an analysis of the importance of specific factors. Furthermore, several interviewees indicated that it was a fun way of structuring the interview. Existing card-sorting studies also indicate avoiding repetitious questioning (Cataldo et al., 1970) and that it is an enjoyable, engaging, interactive and a self-paced exercise (Cataldo et al., 1970; Conrad & Tucker, 2019; Lobinger & Brantner, 2020).

Fifthly, card-sorting allowed both structure and flexibility during the interview. Our pilot study started from a pre-set analytical framework in which all the cards are defined but allowed flexibility in how the interviewees reply and use their own language to discuss their thoughts evoked by the card (see as well Sutton (2011)).

Finally, card-sorting allows quantification of interviewees response patterns while maintaining access to the rich qualitative data of interview transcripts. While this not unique to card-sorting, and quantification is also applied in semi-structured interviews (e.g. Zhu et al., 2022), card-sorting does allow a quantification going beyond simply counting occurrences, but seeing the factors in their interplay (patterns). Our pilot study allowed to conduct cluster analyses on the interviewee response patterns and use the qualitative data to substantiate and enrich the patterns related to the cluster. This advantage is well recognised in card-sorting studies in other fields (Brent et al., 2021; Lobinger & Brantner, 2020).

A disadvantage of card-sorting identified in our adult learning study is that it does not always work for all interviewees and therefore, the approach had to be adapted for interviewees with limited cognitive abilities, or limited Dutch language skills. This is not so much a disadvantage of the card-sorting method per se, but more of the chosen analytical framework which

included high-level cognitive concepts to reflect on. Other card-sorting studies also indicate this disadvantage (Sutton, 2011) and while others indicate that card-sorting can serve as a solution to reach specific vulnerable groups and marginalised populations, especially if the cards are supported by graphic images (Čanigová, 2022).

Conclusions

In our study, the card-sorting methodology is applied to analysing adult learning barriers and motivations to explore what is the added value of the card-sorting methodology in understanding the process of encouraging lifelong learning and which conditions are needed in the use of the card-sorting methodology. It was argued that existing quantitative and qualitative research methods in this field face challenges in supporting the development of effective adult learning policies that are able to address the complexity of barriers adults face to start learning. Our study found that card-sorting offers an alternative and complementary research approach that combines features of qualitative and quantitative research methods. It can enrich the analysis of barriers and motivations and provide insights to support developing more effective adult learning policies and interventions responding to the full interplay of stimulating and hindering factors for adults to learn. Further analysis of the data obtained from our adult learning study is needed to delve deeper into the dynamics and implications for policies.

In terms of future research, it could be explored how the card-sorting method can be further developed as a quantitative data collection method allowing a larger number of interviewees. One way to explore would be to apply card-sorting in online synchronous settings or online settings supported by AI. This could concern an approach where the interviewee and interviewer (or well-trained AI bot) meet in an online environment and do the card-sort. While this is technically possible, and often applied in information architecture and usability research (Cayola & Macías, 2018; Paea & Baird, 2018), it needs to be assessed whether adult learning interviewees feel similarly comfortable to open-up and tell their story. Moving from face-to-face card-sorting to online card-sorting could reduce the time-investment in conducting interviews, allowing more adults to be interviewed and scaling up the results. It would however also come with

considerable challenges, besides purely technical aspects, related to for instance data privacy and motivating specific groups of adults to do the card-sort online.

To conclude, presenting the card-sorting approach and preliminary findings in several meetings and workshops with a variety of policy makers and stakeholders (for instance, for formal VET schools in the Netherlands (March 7 2024), Training Funds in the Netherlands (October 2, 2023), and high level policy makers at the Belgian European Presidency conference in Brussels (April 17 2024)) yielded a lot of interest in the methodology and the expressed conceptual approach. For many stakeholders, it opened a new perspective on the question whether adults are actually in the position to desire learning in the first place. Furthermore, thinking about more holistic approaches to work with the full interplay of hindering and stimulating factors was perceived as an important policy orientation. This signposts also at institutional and policy level there is a need for fine-grained insights into adult learning motivations and barriers to support the development of effective adult learning policies and interventions. Something the card-sorting method can contribute to.

Supplementary materials

Table 6 Outcomes K-Means cluster analysis

Variable	Group	N	Mean	Std.deviation	Std. Error	95% Confidence Interval for Mean		Minimum	Maximum
						Lower Bound	Upper Bound		
AGENCY	1.00	23	.70	1.94	.40	-.14	1.53	-4.00	4.00
	2.00	6	1.67	4.08	1.67	-2.62	5.95	-6.00	6.00
	3.00	15	2.07	2.28	.59	.80	3.33	-3.00	6.00
	4.00	25	5.20	1.66	.33	4.52	5.88	3.00	9.00
	Totaal	69	2.71	2.89	.35	2.02	3.40	-6.00	9.00
CONVERSION	1.00	23	1.91	2.63	.55	.78	3.05	-2.00	6.00
	2.00	6	-6.33	2.50	1.02	-8.96	-3.71	-9.00	-3.00
	3.00	15	9.67	2.58	.67	8.24	11.10	7.00	16.00
	4.00	25	3.56	2.02	.40	2.73	4.39	-2.00	6.00
	Totaal	69	3.48	4.83	.58	2.32	4.64	-9.00	16.00
Life_events	1.00	23	1.17	1.30	.27	.61	1.74	.00	3.00
	2.00	6	-.50	1.38	.56	-1.95	.95	-2.00	1.00
	3.00	15	1.13	1.06	.27	.55	1.72	.00	3.00
	4.00	25	.84	1.37	.27	.27	1.41	-2.00	3.00
	Totaal	69	.90	1.34	.16	.58	1.22	-2.00	3.00

Table 7 ANOVA

Variable	Source of Variation	Sum of Squares	df	Mean Square	F	Significance (p-value)
AGENCY	Between Groups	261.07	3	87.02	18.54	.000
	Within groups	305.14	65	4.69		
	Total	566.20	68			
CONVERSION	Between Groups	1208.56	3	402.85	69.89	.000
	Within groups	374.65	65	5.76		
	Total	1583.22	68			
Life_events	Between Groups	14.39	3	4.80	2.89	.042
	Within groups	107.90	65	1.66		
	Total	122.29	68			

Table 8 HSD Tukey test

Variable	(I)-Group	(J)-Group	Mean Difference (I - J)	Std. Error	Significance (p-value)	95% Confidence Interval	
						Lower Bound	Upper Bound
HSD van Tukey (Agency)	1.00	2.00	-.97	.99	.763	-3.59	1.65
		3.00	-1.37	.72	.235	-3.27	.53
		4.00	-4.50	.63	.000	-6.15	-2.85
	2.00	1.00	.97	.99	.763	-1.65	3.59
		3.00	-.40	1.05	.981	-3.16	2.36
		4.00	-3.53	.98	.004	-6.13	-.94
	3.00	1.00	1.37	.72	.235	-.53	3.27
		2.00	.40	1.05	.981	-2.36	3.16
		4.00	-3.13	.71	.000	-5.00	-1.27
	4.00	1.00	4.50	.63	.000	2.85	6.15
		2.00	3.53	.98	.004	.94	6.13
		3.00	3.13	.71	.000	1.27	5.00
HSD van Tukey (Conversion)	1.00	2.00	8.25	1.10	.000	5.34	11.15
		3.00	-7.75	.80	.000	-9.85	-5.65
		4.00	-1.65	.69	.092	-3.48	.18
	2.00	1.00	-8.25	1.10	.000	-11.15	-5.34
		3.00	-16.00	1.16	.000	-19.06	-12.94
		4.00	-9.89	1.09	.000	-12.77	-7.02
	3.00	1.00	7.75	.80	.000	5.65	9.85
		2.00	16.00	1.16	.000	12.94	19.06
		4.00	6.11	.78	.000	4.04	8.17
	4.00	1.00	1.65	.69	.092	-.18	3.48
		2.00	9.89	1.09	.000	7.02	12.77
		3.00	-6.11	.78	.000	-8.17	-4.04
HSD van Tukey (Life events)	1.00	2.00	1.67	.59	.030	.12	3.23
		3.00	.04	.43	1.000	-1.09	1.17
		4.00	.33	.37	.806	-.65	1.32
	2.00	1.00	-1.67	.59	.030	-3.23	-.12
		3.00	-1.63	.62	.052	-3.27	.01
		4.00	-1.34	.59	.111	-2.88	.20
	3.00	1.00	-.04	.43	1.000	-1.17	1.09

		2.00	1.63	.62	.052	-.01	3.27
		4.00	.29	.42	.898	-.82	1.40
	4.00	1.00	-.33	.37	.806	-1.32	.65
		2.00	1.34	.59	.111	-.20	2.88
		3.00	-.29	.42	.898	-1.40	.82

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Chapter 7 General discussion and conclusions

This final chapter integrates the conceptual, empirical, methodological, and practical insights presented throughout the dissertation. The chapter brings together the two central lines of inquiry, on agency and regional level learning culture, which are reflected in two sub research questions, to formulate an overarching answer to the guiding research question.

What is needed for vulnerable adults to start learning, and which conditions of regional level learning cultures foster such learning?

This section presents a synthesised discussion of the main empirical and conceptual insights from the dissertation, structured around the two sub-questions and leading to answering the key question: *What is needed for vulnerable adults to start learning, and which conditions of regional level learning cultures foster such learning?*

Sub-question 1: Which intrinsic and extrinsic factors enable or hinder vulnerable adults to take up learning, and how do these factors shape their transitions into learning?

The first sub-question examined how vulnerable adults come to engage in learning, drawing on theoretical debates about motivation, barriers, agency, identity and socio-structural contexts. The conceptual review in Chapter 2 and the empirical analysis in Chapter 3 together suggest that participation does not arise from any single factor. Instead, it appears to emerge from a layered and often fragile interplay of motivations, self-beliefs, social relationships and enabling or constraining contextual conditions. This finding speaks to, and sometimes nuances, several of the theoretical claims introduced earlier in the dissertation.

Chapter 2 showed that adults' motivations for learning are diverse and rarely reducible to the labour-market logic inherent in human-capital accounts such as Becker (1964). Although employability was meaningful for some learners, many described learning in ways more consistent with

capability-based perspectives such as Sen (1999, 2009), Nussbaum (2013) and Robeyns (2005, 2017), in which learning is valued because it contributes to well-being, identity, resilience or a sense of belonging. These motivations point to a broader set of capabilities and functionings that adults may have reason to value, supporting arguments from Balatti and Falk (2002) and Feinstein and Hammond (2004) that adult learning carries social and emotional significance beyond economic benefit.

However, the research revealed that motivation alone rarely translated into action. Adults often valued learning but still hesitated to participate because they doubted their own abilities or felt that learning was not for them. Here, the findings resonate strongly with Bandura's emphasis on self-efficacy (Bandura, 2001, 2010) and Ryan and Deci's self-determination theory (Ryan & Deci, 2000). Both bodies of work suggest that individuals act only when they believe they can succeed and when environments support feelings of competence and relatedness. This helps explain why intrinsic valuation, though important, was rarely sufficient for participation among the most vulnerable adults.

The structural dimension of participation also emerged clearly. Cross's typology of situational, institutional and dispositional barriers (Cross, 1981) remains recognisable in the experiences of the adults studied, but the interviews suggest that barriers function less as isolated obstacles and more as intertwined constraints. For example, precarious health or unstable work often interacted with negative school histories or low confidence in ways that compounded disadvantage. This pattern echoes the Matthew effect highlighted by Roosmaa and Saar (2017) and Boeren (2009), whereby those already disadvantaged are least likely to benefit from available opportunities. The findings therefore support the continuing relevance of barrier-based explanations while also indicating that such explanations require more relational and contextual nuance than originally formulated.

Identity also played a central role. Many participants initially rejected the idea that they were learners, often linking learning to memories of school failure. Yet several adults also reported that participation in learning, once initiated, helped build confidence, autonomy and a more positive sense of self. This supports Freire's view of education as a potential generator of

agency (Freire, 2000) and aligns with Hammond and Feinstein's suggestion that adult learning can foster empowerment (Hammond & Feinstein, 2005). The findings thus point towards a bi-directional relationship in which agency is both a precondition for and a possible outcome of learning, complicating linear models of self-directed adult learning. In this sense, the empirical evidence challenges Knowles' assumption that adults naturally approach learning autonomously (Knowles, 1984) and reinforces arguments from Emirbayer and Mische (1998) and Biesta and Tedder (2007) that agency is relationally and temporally constructed.

Chapter 3 explored these dynamics empirically through analysing 69 adults' reflections on hindering and stimulating factors to learn and identified three movements in learning engagement. These three movements show how different constellations of intrinsic and extrinsic factors shape the transitions adults make into learning.

In the first movement, starting to learn by obligation, described as learning imposed, individuals did not value learning and did not perceive themselves as learners. Participation typically emerged from external pressures, activation requirements, welfare obligations or structured day programmes. Agency was highly constrained and closely aligned with Evans' notion of bounded agency (Evans, 2007), where action is shaped more by external structures and routines than by personal aspiration. The finding that participation may initially be experienced as coerced suggests limits to theories that presuppose voluntary engagement. From a Self-Determination Theory perspective (Ryan & Deci, 2000), this form of participation is driven predominantly by external regulation. While this theory suggests that externally imposed motivation may undermine autonomous motivation and long-term engagement, the findings here indicate that, for this group, some degree of external regulation may be a necessary *entry condition* rather than a desired end state. In contexts of severe vulnerability, where autonomy and competence are not yet experienced as realistic possibilities, externally structured learning environments can provide emotional safety, continuity and routine that make initial participation possible at all.

A second movement, learning through agency development, captured cases in which adults did not begin with an intrinsic valuation of learning but

gradually developed agency through relational encounters or life events. Encouragement from a professional, neighbour or family member often served as a turning point, as did personal experiences such as parenthood, illness or unemployment. These findings echo relational theories of agency, especially those of Biesta and Tedder (2007) and Emirbayer and Mische (1998), which emphasise that agency often emerges through supportive interactions and reflective spaces. Low-threshold community environments such as libraries, neighbourhood centres and welfare organisations appeared to serve as enabling spaces where adults could cautiously reconsider their relationship to learning.

The third movement, learning by agency empowerment, involved adults who already valued learning and possessed relatively strong intrinsic motivation. These individuals were not held back by a lack of aspiration but by structural barriers that prevented them from acting on their intentions. Their experiences again underscore Bandura's argument that beliefs about competence matter (Bandura, 2010), but also highlight the importance of concrete conversion factors, affordable provision, flexible scheduling, digital access and recognition of prior learning. Support in these cases functioned less as activation and more as facilitation. The findings suggest that many adults' agency remains unrealised until institutional conditions align with their aspirations, thereby reinforcing the capability interpretation that resources must be convertible into genuine opportunities.

Taken together, the findings indicate that transitions into learning are shaped by a combination of the capability to value learning, the belief that learning is possible and meaningful, and the institutional, social and material conditions that allow adults to act on their aspirations. These interactions appear consistent with the capability-based understanding of agency and conversion factors proposed by Boyadjieva and Ilieva-Trichkova (2021). They also elaborate the bounded and relational nature of agency emphasised by Evans (2007), Emirbayer and Mische (1998) and Biesta and Tedder (2007). The empirical evidence therefore supports theories that conceptualise agency as contingent, situated and co-constructed, while casting doubt on assumptions of universal self-direction in adult learning.

In sum, the first sub-question can be tentatively answered by suggesting that vulnerable adults' engagement in learning depends on the ways in

which personal motivations, identities and self-beliefs intersect with accessible and supportive social and institutional environments. Participation appears most likely when adults both want to learn and feel able to learn, and when the contexts they inhabit provide opportunities that make learning feasible.

Sub-question 2: What are the success factors for regional learning infrastructures and inter-organisational cooperation that enable vulnerable adults to engage in learning?

Chapters 4 and 5 together explored how regional environments shape adults' opportunities to learn, and how organisational relationships, funding structures and governance arrangements condition the forms of support that vulnerable adults encounter. The literature reviewed in Chapter 4 suggested that adult learning is not a purely individual act, but is embedded within socio-spatial contexts that differ considerably across regions. This perspective aligns strongly with the work of Rutten and Boekema (2012), Field and Lynch (2015) and Borkowska and Osborne (2018), who argue that learning opportunities become meaningful only when they are situated within accessible, visible and trusted local infrastructures. These authors highlight that regional learning ecosystems vary in terms of their affordances, the cues and opportunities for action that they make available, and that such affordances have direct implications for adult learning participation.

Chapter 5 then examined these theoretical expectations empirically, using data from three Dutch labour-market regions. The analysis confirmed that the ability of regional ecosystems to support vulnerable adults varies substantially. While many organisations expressed a commitment to collaboration, the coherence of regional infrastructures was often undermined by systemic characteristics that echo concerns raised by the SER (2021), Thunnissen (2021) and others studying the Dutch adult learning system.

One persistent issue was fragmented governance. Responsibility for adult learning was spread across municipalities, VET institutions, welfare organisations, libraries, employers and national agencies, without a clear coordinating actor. This finding aligns closely with international critiques of multi-actor learning systems, such as those by Rubenson (2018),

Desjardins (2017) and Osborne (2014). They caution that decentralised systems require strong coordinating mechanisms to avoid duplication and gaps. In the contexts studied here, fragmentation often translated into parallel initiatives and inconsistent referral pathways. For adults navigating multiple institutional domains, such as employment, welfare or health, this fragmentation sometimes meant that support was experienced as confusing or episodic.

A second challenge concerned the temporal nature of funding. Many initiatives relied heavily on project-based or temporary subsidies. While such arrangements may stimulate innovation, they also contribute to discontinuity, an observation consistent with concerns expressed (Cedefop, 2024; De Greef & De Haan, 2024; Groot et al., 2025; SEOR & Ockham IPS, 2024). For vulnerable adults, particularly those who benefit from routine, predictability and established relationships, these fluctuations tended to undermine trust and weaken continuity in learning trajectories.

Collaboration across organisations also proved variable. Many of the difficulties observed, including differences in mandates, cultures and funding timelines, mirror the organisational misalignments identified in earlier research on cross-sector governance. While some regions demonstrated relatively cohesive partnerships, these tended to rely on informal networks or historic relationships rather than on formalised structures, making them vulnerable to staff changes or the ending of particular projects. This finding resonates with the literature on learning regions, for example Longworth (2019) and Borkowska and Osborne (2018) suggest that the institutionalisation of collaboration, rather than simply the will to collaborate, is central to sustaining inclusive learning infrastructures.

Taken together, the findings suggest that regional learning infrastructures are most supportive when they offer adults not only access to provision, but coherent, visible and enduring pathways that can be recognised and trusted over time. Where such infrastructures are absent or fragmented, adults' bounded agency tends to be further constrained, as learning remains opaque, episodic or difficult to relate to personal circumstances. Where they are present, agency may be expanded not only by providing opportunities, but by shaping how adults encounter and interpret learning.

More specifically, supportive regions appear to combine organisational coordination with strong human and relational capacities. The presence of accessible intermediaries, such as guidance professionals, community workers or educators, who can flexibly attune to adults' life situations, build trust and offer continuity over time seems particularly important. These actors help translate institutional offers into personally meaningful options. In capability-oriented terms, regional learning infrastructures thus function as conversion contexts: they expand or restrict adults' real freedoms to pursue learning they have reason to value.

In this sense, the dissertation suggests, cautiously, that the success of regional learning infrastructures lies not merely in their organisational arrangements but in the extent to which they create conditions under which vulnerable adults can imagine themselves as learners, trust the support offered and access opportunities that fit their life circumstances. This interpretation aligns closely with the theoretical work of Sen (1999, 2009), Nussbaum (2013), Robeyns (2005, 2017), Boyadjieva and Ilieva-Trichkova (2021), while also giving empirical substance to relational and socio-spatial accounts of agency developed by Evans (2007), Biesta and Tedder (2007) and Emirbayer and Mische (1998).

Key question: What is needed for vulnerable adults to start learning, and which conditions of regional level learning cultures foster such learning?

Taken together, the findings from the two sub-questions suggest that vulnerable adults appear to start learning when personal motivations, identities and self-beliefs begin to shift, and when these shifts coincide with regional conditions that make learning visible, accessible and emotionally or practically feasible. Rather than pointing to a single mechanism, the evidence indicates that learning engagement emerges at the intersection of individual capabilities and the socio-spatial environments in which adults live. This interpretation resonates strongly with the capability approach introduced in Chapter 1, while also refining and, in some instances, challenging several of the classic and contemporary theories discussed there.

The three movements identified in the analysis of adults' reflections on stimulating and hindering factors to learn offer a useful way to understand

how different groups of adults rely on different combinations of support. Across all three movements, a common thread emerges. Vulnerable adults do not necessarily learn because they independently decide to. Learning becomes possible when personal capability, relational support and contextual stability align. This observation challenges theories that foreground either individual motivation alone, as in human capital models, or structural barriers alone. Instead, the findings support an interactional and layered perspective, consistent with capability theorists and with socio-spatial accounts of adult learning.

Turning to the regional dimension, the analysis suggests that regional learning cultures play a crucial role in shaping whether individual intentions, whether fragile or strong, become actionable. Even strongly motivated adults struggled when infrastructures were unstable or opaque. This suggests that while the literature often celebrates the potential of learning regions, the empirical reality may be more uneven, and the functioning of such regions more vulnerable to policy and funding discontinuities than many conceptual accounts imply.

Bringing these strands together, a tentative answer to the main research question might be framed as follows. Vulnerable adults seem most likely to begin learning when shifts in their personal circumstances, whether in motivation, identity or reflective capacity, coincide with regional conditions that provide stable, relationally attuned and practically accessible routes into learning. Personal readiness alone appears insufficient, just as structural provision alone cannot guarantee engagement. The two seem to require alignment. Regional learning cultures, understood as socio-spatial conversion contexts, do not determine whether adults will engage in learning, but they shape the range of options that adults perceive as viable, meaningful and safe. Learning becomes possible when adults encounter encouragement, see learning as meaningful and find that their region offers coherent support, trusted access points, stable infrastructures and recognition of their capabilities and life projects. In other words, vulnerable adults seem to learn when regions learn how to support them.

In this sense, the findings broadly support the integrative potential of the capability approach outlined in Chapter 1. Adults must be able to value learning, as suggested by capability theorists, believe that learning is

possible, as emphasised by Bandura (2001, 2010) and Ryan and Deci (2000), and inhabit environments that allow them to act on these valuations, as argued by Evans (2007), Biesta and Tedder (2007) and learning-region scholars. At the same time, the findings complicate some of the claims in the literature, particularly those that assume inherent adult self-direction or that portray regional ecosystems as uniformly capable of supporting vulnerable groups.

Theoretical contributions

This dissertation contributes to the theoretical landscape of adult learning by bringing together concepts of agency, boundedness, socio-spatial learning cultures and the capability approach, and by grounding these in empirical analyses of vulnerable adults and regional learning infrastructures. The empirical chapters do not simply apply existing theories, but refine, extend and sometimes question them. Four main contributions can be distinguished.

1. Advancing an empirically grounded capability-based perspective on adult learning

A first contribution lies in developing a capability-based understanding of adult learning that is both conceptually coherent and empirically informed. Building on Sen (1999, 2009), Nussbaum (2013), Robeyns (2005, 2017), and Boyadjieva and Ilieva-Trichkova (2021), the dissertation conceptualises adult learning as the expansion of real freedoms to pursue learning trajectories that adults have reason to value, rather than as participation alone. The empirical work in Chapter 3 strengthens this perspective. The analysis of adults' reflections on factors that influence their engagement with learning showed that adults rarely describe learning only in terms of future income, as suggested in human capital theory (Becker, 1964). Instead, they emphasise well-being, identity, social connection and a sense of direction in life, which aligns closely with capability accounts and with empirical work by Balatti and Falk (2002) and Feinstein and Hammond (2004). At the same time, the three movements identified in Chapter 3 demonstrate that valuing learning is not enough: adults need the belief that learning is possible for them and they need conversion conditions that allow them to act.

2. Conceptualising regional learning cultures as collective conversion environments

A second contribution, further building on the first, concerns the way the dissertation conceptualises and empirically illustrates regional learning cultures. Existing literature on learning cities and learning regions (Barnes et al., 2019; Borkowska & Osborne, 2018; Longworth, 2019) emphasises networks, partnerships and innovation, but often pays less attention to how these meso-level arrangements translate into real freedoms for specific groups.

The regional case studies in Chapter 5 suggest that regions can be understood as collective conversion environments. Drawing on Evans' notion of bounded agency (Evans, 2007) and on capability theory, the dissertation shows that regional infrastructures condition whether adults' motivations and emerging agency can be converted into actual learning practices. Elements such as governance stability, continuity of funding, visibility of provision, trusted intermediaries, shared narratives about learning and low-threshold access points are not just organisational features. They are collective factors that change what adults are able to do in practice.

By showing how coordinated infrastructures can expand agency, and how fragmentation and short-term funding can restrict it, the dissertation recasts regional learning cultures as meso-level capability systems. In doing so, it moves beyond viewing the region as merely an administrative or policy unit and instead conceptualises it as a socio-spatial space of conversion where inequalities can be either mitigated or reinforced. This provides a more fine-grained and empirically grounded interpretation of learning region ideas than is often found in the more optimistic policy-oriented literature.

3. Extending theories of vulnerability in adult learning

A third contribution lies in extending theories of vulnerability. In much policy discourse, vulnerable adults are implicitly treated as a homogeneous group or as individuals with deficits that need to be corrected. The dissertation, inspired by capability-oriented definitions of vulnerability (Boyadjieva &

Ilieva-Trichkova, 2021; Egdell & Graham, 2017), approaches vulnerability as a relational and contextual phenomenon.

The empirical findings support this interpretation. The three movements in Chapter 3 show that vulnerability is not only a matter of low motivation or weak skills, but arises from intersections of their life course, social networks, institutional structures and regional conditions. Adults become vulnerable when their conversion factors are restricted, for example by unstable employment, poor health, fragmented services or negative school histories, which limits their ability to realise learning aspirations even when these aspirations exist. This resonates with Sen's notion of capability deprivation (Sen, 1999) and illustrates it concretely for the field of adult learning.

The dissertation therefore suggests that policies focused solely on "activating" individuals risk misdiagnosing the problem. Rather than framing intervention as correcting individual deficits, the findings point towards capability-building policies that invest in supportive environments, recognition, guidance and stable infrastructures. In other words, inclusion in adult learning may require rebalancing attention from fixing individuals toward improving the conversion contexts in which they live.

4. Reconnecting disjuncture, social support and adult learning

A final theoretical contribution concerns the role of life events and disjuncture. Jarvis (2012) describes disjuncture as a key trigger for learning, namely the moment when people realise that existing understandings are insufficient to make sense of new experiences. The interviews show many such moments: bereavement, illness, divorce, job loss, reorganisation at work, becoming a parent or encounters with the justice system. These events rarely relate directly to learning, yet they often created space for reflection and reconsideration.

The empirical contribution of this dissertation is to show that such disjunctures only translated into learning when they coincided with relational support. Adults frequently described how a neighbour, friend, family member, community worker or professional coach helped them interpret these events as a possible turning point and encouraged them to consider learning. In this sense, the data link Jarvis' notion of disjuncture

(Jarvis, 2012) to relational accounts of agency and to capability theory by demonstrating that the potential of disjuncture is conditional on the presence of enabling social environments.

This has implications for how disjuncture might be considered in policy and practice. It is neither possible nor desirable to “create” life events, but it may be feasible to strengthen the social and community infrastructures that help people respond to such events in learning-oriented ways. Ideas such as community figures acting as bridges to learning (IDEA Consult, 2024) or broader efforts to stimulate a culture where people encourage one another to learn could be seen as attempts to build such relational conversion factors.

These findings also raise questions about the prevailing image of adults as self-activating learners. Van der Veen and Wildemeersch (2012) argue that the paradigm of the self-activating adult may obscure the role of social and structural conditions. The present dissertation provides additional empirical support for this critique. For many vulnerable adults in the study, it was precisely the combination of disjuncture and external encouragement that made learning imaginable. This suggests that adult learning theory may benefit from further integrating disjuncture, social support and capability expansion into a more relational understanding of how learning begins.

Methodological contributions

Methodologically, this dissertation sought to gain insight into how adults in vulnerable positions make sense of learning, articulate barriers and motivations, and navigate transitions in their learning trajectories. To support this aim, a card-sorting technique was developed and applied as part of qualitative interviews. While card-sorting has been used in diverse fields (Brent et al., 2021; Cataldo et al., 1970; Conrad & Tucker, 2019; Sutton, 2011), its application in research on adult learning among socially and educationally disadvantaged groups remains limited. In this study, it proved to be a promising, though not unproblematic, methodological approach.

The empirical chapters suggest that the method can help surface tacit, affective and sometimes ambivalent elements of learning decision-making that may remain underexplored in standard narrative interviews. The use of tangible cards, combining short textual prompts with representative images (Čanigová, 2022), and the possibility to move, cluster and revisit them over time appeared to support participants in externalising thoughts that were difficult to verbalise directly. Particularly for adults with low confidence or fragile learner identities, the material and structured nature of the exercise seemed to lower the threshold for reflection and reduced interview-related anxiety. This offered a richer basis for analysing the layered transitions in learning engagement discussed in Chapter 3, including shifts in self-belief, learner identity and relational support.

A further advantage of the approach was its hybrid character. The structured component of card-sorting made it possible to compare patterns across cases without reducing the analysis to decontextualised categories. The comparative analyses of 69 adult learners (Chapter 3) and 29 organisational representatives (Chapter 5) were feasible because the method generated a consistent yet flexible data structure. This allowed recurring configurations of agency, conversion factors and contextual influences to be identified, while retaining sensitivity to individual trajectories. In this sense, the method functioned not only as a data collection instrument, but also as a heuristic device that supported cross-case interpretation.

At the same time, the methodological reflections in Chapters 5 and 6 indicate that card-sorting should not be seen as a neutral or universally applicable tool. The predefined set of cards inevitably framed the conversation and may have foregrounded certain dimensions of learning while backgrounding others. Nevertheless, within this study, the method appeared to be particularly useful for exploring the micro-level dynamics of bounded agency. It enabled analysis not only of which factors adults identified as relevant, but also of how they weighed trade-offs, interpreted life events and constructed their own understanding of what learning could or could not mean in their situation. This was instrumental in identifying the three movements in learning engagement and in tracing how personal, relational and structural conditions intertwined in participants' narratives.

All in all, the use of card-sorting resonates with the epistemological orientation of the dissertation. The capability approach emphasises voice, reflexivity and the importance of enabling people to express what they themselves value. In this study, the card-sorting exercises offered participants a degree of control over the sequencing and emphasis of their narratives and allowed them to revisit earlier choices as their reflections evolved. While this does not eliminate power asymmetries inherent in research, it may constitute a fruitful methodological entry point for future studies seeking to investigate adult learning with, rather than on, vulnerable groups.

Policy and practice implications

The empirical findings of this dissertation have several implications for how policies and practices might more effectively support vulnerable adults to engage in learning. By combining the three movements identified in Chapters 2 and 3 with the regional dynamics examined in Chapters 4 and 5, the dissertation shows that engaging vulnerable adults in learning requires interventions that are both differentiated and structurally embedded. This stands in contrast to much of the existing policy landscape, which often assumes that a single set of incentives or outreach measures will suffice.

Differentiated support based on learning movements

One key implication concerns the need to tailor interventions to the different patterns of transition observed in adult learners. Research on clustering non-participants, such as that of Kalenda and Kočvarová (2022) and Kalenda et al. (2024), often yields relatively shallow practical recommendations focused on broad motivational categories. By contrast, the three movements identified in this dissertation capture the dynamic processes through which adults come to reinterpret learning, and therefore point to more fine-grained intervention logics, as shown here below.

Adults whose learning is largely *imposed* (movement 1) typically do not value learning and do not perceive themselves as learners. Participation emerges through external pressures such as welfare obligations or structured day programmes, reflecting highly constrained agency in line with Evans' concept of bounded agency (Evans, 2007). From a Self-Determination Theory perspective (Ryan & Deci, 2000), this participation is

driven by external regulation, which is generally seen as undermining autonomous motivation. However, for adults in severe vulnerability, external structure, routine and predictability may function as necessary entry conditions rather than as a sustainable motivational strategy. Without institutional support that fosters competence, relatedness and emotional safety, activation- or incentive-based policies are unlikely to lead to meaningful or sustained learning.

Adults whose learning emerges *through the gradual development of agency* (movement 2) require relationally attuned, context-sensitive support. Their trajectories strongly echo relational conceptions of agency (Biesta & Tedder, 2007; Emirbayer & Mische, 1998), which highlight the importance of encounters that help individuals reinterpret themselves as capable learners. For this group, policies that invest in trusted intermediaries, community-based access points, and sustained outreach are essential.

Adults whose learning is enabled by *agency empowerment* (movement 3) tend to value learning intrinsically but are held back by structural barriers. For them, flexible provision, financial accessibility, transparent pathways and practical forms of guidance play decisive roles. Their experiences reflect the capability approach: they have the *freedom to value* learning but not always the *means to convert* that valuation into action.

Taken together, these movements suggest that policies need to be differentiated, acknowledging that different groups require different types of support, ranging from stabilising environments, to relational activation, to barrier removal. A uniform adult learning strategy risks reproducing inequalities rather than reducing them. A key question remains how adults can be classified into one of the groups prior to undergoing a movement. Here diagnostic tools, developed based on the card-sorting methodology could be used. This however requires further study.

Strengthening the role of the social environment

Across the movements, the social environment consistently emerged as a decisive factor. Even adults who appeared to be largely self-driven often described moments in which partners, friends, neighbours, or professionals played a catalytic role in reinforcing the value or feasibility of learning. This implies that adult learning policies should not focus solely on

individuals but should also seek to strengthen the *social ecosystems* around them. Possible routes include awareness campaigns that normalise adult learning as a life course activity; community-based roles such as “learning ambassadors” or “bridge figures” (IDEA Consult, 2024); and finally, attention to family involvement, peer support mechanisms, and neighbourhood-based initiatives. Such directions also align with socio-spatial theories of learning (Field & Lynch, 2015; Rutten & Boekema, 2012) which emphasise the importance of everyday settings in shaping agency.

Strengthening regional learning cultures as conversion environments

The third major implication concerns the structural and organisational conditions under which vulnerable adults engage with learning. The empirical analysis of three Dutch regions showed that many of the constraints faced by adults originate not in personal deficits but in fragmented, short-term, and poorly coordinated regional infrastructures. This mirrors concerns raised by many authors (Cedefop, 2024; SER, 2024; Thunnissen, 2021), yet the dissertation adds nuance by showing *how* such fragmentation interacts with adults’ agency.

Stable, relationally attuned and accessible regional infrastructures are essential conversion environments in Sen’s (1999) sense: they expand what adults are practically able to do. Policy efforts could therefore prioritise longer-term, pooled regional funding; clearer governance arrangements; shared responsibility among municipalities, (vocational) education and training institutions, and welfare actors; and formalised platforms where collaboration becomes structurally embedded rather than dependent on individual relationships.

The findings also suggest that regional infrastructures need to incorporate trusted access points, visible opportunities, and relational guidance, especially in neighbourhood and community settings. These conditions are consistent with what learning-region scholars identify as critical success factors (Borkowska & Osborne, 2018; Longworth, 2019), but the empirical material shows the consequences of their absence for adults in vulnerable situations.

Integrating organisational learning and cross-sectoral exchange

A further implication follows from how organisations differ in their strengths and challenges. As found in this dissertation, work-oriented organisations provide flexibility and funding continuity, educational providers specialise in structuring learning pathways, and welfare organisations excel in outreach and trusted relationships. These complementary strengths mirror the kind of institutional diversity that Spours (2024) associates with effective social skills ecosystems. Yet, as shown in Chapter 5, this diversity often remains underutilised due to fragmented structures and project-driven logic.

Policies that promote structured cross-sector learning, joint professional development, shared monitoring systems, and integrated guidance services could allow organisations to learn from one another and strengthen the regional level learning infrastructure to more effectively support adults whose needs cut across sectors.

Limitations and directions for future research

While this dissertation offers a multi-layered understanding of how vulnerable adults engage with learning and how regional infrastructures shape these opportunities, several limitations should be acknowledged.

First, although the study drew extensively on the narratives of adult learners, the analysis of organisational perspectives was based on a separate set of interviews and was not fully integrated into the movement-based framework. As a result, the dissertation could only partially capture how organisational practices, professional routines and institutional logics shape the conditions under which adults start learning. More explicit integration of organisational perspectives, particularly those of frontline professionals and coordinating actors, could yield richer insights into how support systems operate in practice, where they succeed in expanding agency, and where they may unintentionally reproduce inequalities or bounded forms of choice.

Second, the movement model developed in this dissertation emerged from qualitative inquiry among adults that succeeded in starting learning (a deviant case approach was taken). While this approach was well suited to

identifying nuanced, non-linear and dynamic pathways into learning, it also means that the relative prevalence of the three movements remains unknown. A logical next step would therefore be the development of a quantitative or mixed-methods instrument that can classify firstly learners according to the movements they have undergone, or are at risk of not completing, and secondly non-learners in terms of their envisaged movement into learning. Such an instrument could test the robustness of the movement typology, assess how patterns vary across regions and target groups, and strengthen the model's applicability for monitoring and policy targeting.

Third, further methodological development of the card-sorting technique is warranted. Although the method proved effective in eliciting deep reflection from adults with low literacy levels or complex life histories, scaling it to larger samples remains challenging. Future research could explore digital, hybrid or AI-assisted forms of card sorting that preserve its reflexive, dialogical and participant-centred qualities while enabling broader data collection. This would open possibilities for comparative and longitudinal research, as well as for embedding the method more structurally in guidance and intake practices.

Fourth, the movement typology could be strengthened through systematic dialogue with other classificatory frameworks in adult education research, such as those proposed by Kalenda and Kočvarová (2022) and Kalenda et al. (2024). Linking these approaches may help sharpen distinctions between learner groups, clarify which combinations of interventions work for whom, and better connect movement-based insights to existing typologies used in policy and evaluation. Such integration would also support the development of monitoring tools that move beyond participation rates towards more differentiated assessments of learning trajectories.

Beyond these empirical and methodological extensions, future research could further elaborate the theoretical contributions of this dissertation. Building on the Capability Approach, future studies could examine how different configurations of conversion factors, at individual, organisational and regional levels, interact over time to expand or constrain adults' capability to learn. Longitudinal research would be particularly valuable in

tracing how learning experiences feed back into agency, aspirations and perceived futures, and how regional learning cultures evolve in response to policy interventions. In addition, future work could explore how movement-based conceptualisations of learning engagement can inform a more dynamic understanding of lifelong learning systems. Rather than categorising adults as participants or non-participants, research could focus on transitions, thresholds and moments of activation or disengagement. This would further strengthen the contribution of the Capability Approach to adult education research by linking normative concepts of freedom and choice to empirically observable learning processes.

In sum, while this dissertation provides a solid foundation for understanding how vulnerable adults engage with learning and how regional infrastructures shape their real freedoms to do so, further research is needed to broaden the empirical base, deepen the integration of organisational and learner perspectives, and advance theoretical and methodological tools that can support more inclusive, responsive and effective lifelong learning policies.

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Samenvatting

Kwetsbare volwassenen in beweging brengen richting leren: de rol van agency en regionale leeromgevingen: Individuele en contextuele factoren die leren van kwetsbare volwassenen bevorderen of belemmeren

Wanneer leren voor volwassenen weer een realistische optie wordt, gaat het zelden om één beslissing of één prikkel. Het is eerder een verschuiving in hoe iemand zichzelf, zijn toekomst en zijn omgeving ervaart. Dat is de kern van deze dissertatie: begrijpen wat er nodig is om leren opnieuw in beeld te brengen voor volwassenen in een kwetsbare positie, en hoe regionale leerculturen die beweging kunnen ondersteunen door het handelingsvermogen (agency) van mensen te versterken. Het proefschrift vertrekt daarmee nadrukkelijk niet vanuit de vraag waarom mensen niet leren, maar vanuit de vraag onder welke omstandigheden leren weer betekenisvol, haalbaar en minder risicovol kan worden.

In veel landen, waaronder Nederland, wordt leren op volwassen leeftijd beleidsmatig gezien als een sleutel tot het omgaan met maatschappelijke verandering. Technologische ontwikkelingen, krapte op de arbeidsmarkt en de wens om mensen duurzaam inzetbaar te houden leiden tot een beleidslogica waarin leren wordt neergezet als een noodzakelijke en in principe voor iedereen beschikbare route. Als er maar voldoende aanbod, flexibiliteit en financiële instrumenten zijn, zo is vaak de impliciete gedachte, dan kan iedereen leren wanneer dat nodig is.

Tegelijkertijd laat de praktijk een hardnekkig patroon zien: deelname aan leren is sterk ongelijk verdeeld. Juist volwassenen die al langere tijd in kwetsbare omstandigheden leven, met een opeenstapeling van sociale, financiële, gezondheids- of werkgerelateerde zorgen, nemen relatief weinig deel. Voor hen is leren vaak niet zozeer een keuze die men bewust afwijst, maar iets dat buiten het denkkader valt. Leren concurreert met urgenter ervaren opgaven, zoals het overeind houden van het dagelijks leven, omgaan met gezondheidsklachten, het verminderen van stress, of het zorgen voor anderen. Deze spanning tussen beleidsambitie en hardnekkige ongelijkheid vormt het vertrekpunt van het onderzoek.

Tegen die achtergrond onderzoekt de dissertatie wat er nodig is om volwassenen in een kwetsbare positie te ondersteunen bij het (her)starten van leren, en welke rol de omgeving daarin speelt. De centrale vraag is wat kwetsbare volwassenen nodig hebben om te beginnen met leren, en welke regionale voorwaarden bijdragen aan leeromgevingen die dit proces ondersteunen. Daaronder liggen twee lijnen die in het proefschrift bewust met elkaar worden verbonden. De eerste richt zich op het individu: welke factoren, intrinsiek en extrinsiek, stimuleren of belemmeren leren, en hoe zien overgangen van niet-leren naar leren eruit? De tweede richt zich op het regionale niveau: welke succesfactoren kenmerken regionale infrastructuren en samenwerking tussen organisaties die leren door volwassenen in kwetsbare posities kunnen ondersteunen?

De expliciete koppeling tussen beide sporen is essentieel. De agency-track laat zien hoe leerprocessen zich in levens onvouwen, hoe motivatie ontstaat of afneemt, en hoe leren weer denkbaar wordt. De regio-track laat zien welke omgevingscondities nodig zijn om die agency niet alleen te activeren, maar ook te dragen en te versterken. Het gaat dus niet om twee losse analyses, maar om één onderliggend vraagstuk: hoe kunnen regionale leerculturen zo worden ontwikkeld dat ze agency van volwassenen in kwetsbare posities vergroten?

Een centrale theoretische stap in het proefschrift is dat leren niet wordt benaderd als geïsoleerde gedragskeuze, maar als proces dat samenhangt met reële handelingsruimte en context. Hiervoor gebruikt het proefschrift de capability-benadering. Die verschuift de aandacht van formele kansen (er is aanbod, er zijn subsidies) naar reële mogelijkheden (kan iemand leren als waardevol zien, en kan die waardering worden omgezet in handelen). Leren is in deze benadering geen doel op zichzelf, maar een mogelijke bijdrage aan een leven dat iemand reden heeft om waardevol te vinden. Daarmee wordt ook zichtbaar waarom leren voor sommige volwassenen geen prioriteit kan zijn, zonder dat dit direct als gebrek aan motivatie moet worden gedeut.

Het concept agency is in dit kader een sleutelbegrip. Agency gaat over richting geven, plannen maken, stappen zetten richting een gewenste toekomst. Het proefschrift laat zien dat agency fluctueert en contextafhankelijk is. Voor volwassenen in kwetsbare posities is agency

vaak begrensd: niet omdat er geen wensen of ambities zijn, maar omdat eerdere ervaringen met falen, uitsluiting of instabiliteit leren tot een risico maken. Leren vraagt investering, tijd, vertrouwen en vaak ook de bereidheid om opnieuw “leerling” te zijn, precies wat door negatieve ervaringen beladen kan zijn.

Daarom introduceert en verdiept het proefschrift ook het begrip omzettingsfactoren: sociale, institutionele en materiële factoren die bepalen of beschikbare middelen ook daadwerkelijk kunnen worden omgezet in handelen. Die omzettingsfactoren staan niet los van agency, maar zijn ermee verweven. Een omgeving kan agency versterken of beperken door erkenning te bieden, door nabijheid te organiseren, door informatie begrijpelijk te maken, door ruimte te laten voor twijfel en eigen tempo, of juist door druk, wantrouwen en versnippering te reproduceren.

Een cruciale theoretische bijdrage is bovendien dat agency niet alleen als voorwaarde voor leren wordt gezien, maar óók als mogelijke uitkomst ervan. Leren kan bijdragen aan meer zelfvertrouwen, reflectievermogen en toekomstgerichtheid. Tegelijkertijd is het juist voor volwassenen in kwetsbare posities vaak moeilijker om leeropbrengsten te verzilveren, omdat ondersteunende omzettingsfactoren ontbreken. Daarmee wordt het bekende Matthew-effect zichtbaar: wie al sterker staat, profiteert meer; wie kwetsbaar is, ervaart extra drempels én minder opbrengst. Het proefschrift draagt bij door deze dynamiek niet als onvermijdelijk te beschouwen, maar te analyseren als resultaat van interacties tussen agency, omgeving en de mogelijkheid om leerwinsten om te zetten in duurzaam perspectief.

Methodologisch kiest het proefschrift voor een kwalitatieve, verkennende aanpak die gericht is op theorievorming en verdieping. Het combineert narratieve literatuurstudies met empirisch onderzoek onder zowel volwassenen als organisaties. De literatuurstudies zijn bewust narratief: niet bedoeld als uitputtend overzicht, maar als middel om concepten te verkennen en te verdiepen door inzichten uit onderwijs, sociologie, psychologie en beleidsstudies samen te brengen.

Het empirische deel bestaat uit 69 interviews met volwassenen in kwetsbare posities en 29 interviews met vertegenwoordigers van organisaties die volwassenen ondersteunen. Een onderscheidend

methodologisch element is het gebruik van card-sorting in de interviews met volwassenen. Respondenten ordenen en prioriteren zelf factoren die in hun transitie naar leren meespelen: steun, belemmeringen, motieven, ervaringen, kantelpunten. Hierdoor wordt zichtbaar wat mensen belangrijk vinden, hoe ze relaties leggen tussen factoren en hoe ze hun eigen verhaal herstructureren terwijl ze het vertellen. De methode maakt ruimte voor reflectie, verlaagt de kans dat respondenten zich uitsluitend aanpassen aan het “juiste” antwoord, en voorkomt dat de onderzoeker al te sterk stuurt vanuit vooraf vastgelegde categorieën.

De analyse combineert kwalitatieve analyse met beschrijvende kwantitatieve elementen om patronen te kunnen herkennen zonder de complexiteit van individuele trajecten te reduceren. Dat sluit aan bij het theoretisch uitgangspunt: leren is geen simpele uitkomstvariabele, maar een tijdgebonden proces met transities, bewegingen en contextuele afhankelijkheden.

Op basis van de interviews met volwassenen in kwetsbare posities onderscheidt het proefschrift drie movements: terugkerende manieren waarop de overgang van niet-leren naar leren kan verlopen. Deze movements zijn geen “types mensen”, maar patronen in transitieprocessen.

De eerste movement is leren onder druk of dwang. Hier start leren niet vanuit eigen waardering, maar vanuit externe eisen of verplichtingen, bijvoorbeeld via re-integratie of activeringsbeleid. In deze movement is agency beperkt: leren wordt ervaren als iets dat moet. Dat kan tot deelname leiden, maar het is fragiel zolang de waardering voor leren niet groeit en zolang de omgeving weinig ruimte biedt om autonomie, competentie en vertrouwen op te bouwen. Zonder ondersteuning kan dit leiden tot weerstand of uitval: niet omdat mensen per se niet willen, maar omdat leren in deze vorm vooral als risico en controle wordt ervaren.

De tweede movement is leren via geleidelijke ontwikkeling van agency. Deze movement laat zien hoe belangrijk de omgeving kan zijn in het “mogelijk maken” van leren. Vaak is er een persoon of plek die fungeert als scharnier: een begeleider, een docent, een sociaal werker, een bibliotheek, een werkgever, een buurthuis. Door erkenning, nabijheid en praktische ondersteuning wordt leren stap voor stap minder bedreigend. Mensen

hoeven niet meteen “gemotiveerd” te zijn; motivatie kan groeien doordat ze zich competent voelen, doordat leren aansluit bij hun leven en doordat ze niet alleen hoeven te navigeren door een complex systeem. Agency ontstaat hier relationeel: niet als individuele eigenschap die je wel of niet hebt, maar als iets dat wordt opgebouwd in een ondersteunende context.

De derde movement is leren vanuit eigenaarschap en intrinsieke motivatie. Hier ervaart iemand leren als bewuste, waardevolle keuze. Vaak is er een kantelpunt: een levensgebeurtenis, een verandering in werk of gezondheid, een moment waarop het bestaande pad niet meer werkt. Wat opvalt is dat ook deze movement niet losstaat van omgeving. Intrinsieke motivatie kan opbloeien, maar blijft kwetsbaar wanneer ondersteuning versnipperd is, wanneer financiering wegvalt of wanneer er geen plek is om door te groeien. Regionale structuren maken hier het verschil tussen een eenmalige ervaring en een duurzamer leerpad.

Over de movements heen laat het proefschrift zien dat leren zelf agency kan versterken: succeservaringen vergroten zelfvertrouwen en toekomstperspectief. Maar even belangrijk is de constatering dat deze versterking ongelijk kan uitpakken wanneer omzettingsfactoren ontbreken. Leren kan dan wel beginnen, maar niet beklijven of niet doorwerken in het dagelijks leven.

De regio-track onderzoekt hoe organisaties en netwerken, gemeenten, onderwijsinstellingen, bibliotheken, welzijn, werkgevers, ondersteuning vormgeven en hoe dat uitwerkt op de leerervaringen van volwassenen in kwetsbare posities. De dissertatie is bewust terughoudend in causale claims: sterke regionale samenwerking leidt niet automatisch tot meer leren. Wel wordt zichtbaar dat regionale contexten voorwaarden kunnen creëren waarin leren minder risicovol wordt ervaren.

Wanneer organisaties elkaar kennen, doorverwijzing soepel is, en er continuïteit is in begeleiding, ontstaat minder versnippering en meer herkenbaarheid. Nabijheid, vertrouwen en persoonlijke relaties blijken juist voor volwassenen in kwetsbare posities belangrijk, mede omdat eerdere ervaringen met instituties wantrouwen kunnen hebben opgebouwd. Tegelijkertijd toont de dissertatie hoe kwetsbaar regionale infrastructuren zijn wanneer ze afhankelijk blijven van tijdelijke financiering of individuele

kartrekkers. Dan verdwijnt institutioneel geheugen en moeten volwassenen steeds opnieuw beginnen, wat het vertrouwen kan ondermijnen.

De belangrijkste theoretische bijdrage is dat het proefschrift agency en omgeving niet naast elkaar zet, maar als één dynamisch geheel analyseert. Door leren te benaderen als capability wordt zichtbaar dat beleid niet alleen aanbod moet creëren, maar vooral reële mogelijkheden. De agency-track laat zien hoe leren denkbaar wordt via bewegingen in motivatie, vertrouwen en toekomstoriëntatie. De regio-track laat zien dat die bewegingen niet duurzaam kunnen worden zonder regionale leerculturen die omzettingsfactoren leveren: nabijheid, begeleiding, stabiliteit, erkenning, en ruimte voor tempo.

Daarmee verlegt het proefschrift de vraag van “hoe activeren we individuen?” naar “hoe ontwikkelen we regionale leerculturen die agency kunnen dragen en versterken?” Dat doorbreekt een simpele scheiding tussen individuele verantwoordelijkheid en systeemverantwoordelijkheid. Leren is relationeel, contextueel en tijdgebonden, en ongelijkheid ontstaat juist in de interactie tussen agency en omzettingsfactoren, ook in de mate waarin leeropbrengsten kunnen worden omgezet in duurzame verbetering van bestaanszekerheid en perspectief.

Het proefschrift levert ook methodologische reflecties die inhoudelijk aansluiten bij de theoretische inzet. De card-sorting methode is niet alleen een techniek, maar een manier om leerprocessen serieus te nemen zoals mensen die zelf ervaren. Respondenten krijgen taal en structuur om ambivalentie, twijfel, schaamte, hoop en praktische zorgen te ordenen. Dat helpt om te vermijden dat niet-leren wordt gereduceerd tot simpele verklaringen (zoals “lage motivatie”) en om juist de procesmatige aard zichtbaar te maken: hoe iets langzaam verschuift, hoe steun op het juiste moment verschil maakt, hoe een kleine ervaring een beweging kan inzetten.

Ook de combinatie van kwalitatieve diepgang met beschrijvende kwantitatieve mapping is methodologisch betekenisvol. Die keuze maakt het mogelijk om patronen te zien zonder de rijkdom van individuele verhalen kwijt te raken. Daarmee sluit de methode aan bij de boodschap van het proefschrift: beleidsrelevante kennis over leren ontstaat niet alleen uit cijfers, maar uit inzicht in processen.

De beleidsimplicaties worden in het proefschrift bewust met terughoudendheid geformuleerd, maar zijn richtinggevend. Een eerste implicatie is dat LLO-beleid baat heeft bij een bredere blik op wat leren betekent in verschillende levenssituaties. Niet iedereen kan op elk moment leren als prioriteit zien. Instrumenten die sterk inzetten op individuele verantwoordelijkheid en snelle activering riskeren dat ze precies de verschillen negeren die ongelijkheid reproduceren.

Een tweede implicatie is dat leren niet alleen beoordeeld zou moeten worden op deelnamecijfers. Voor volwassenen in kwetsbare posities kunnen “kleine” stappen, zoals vertrouwen herwinnen, mogelijkheden verkennen, sociale relaties opbouwen, schaamte verminderen, weer durven plannen, juist cruciale voorwaarden zijn voor latere deelname. Dat vraagt om andere vormen van monitoring en evaluatie, waarin ook agency-ontwikkeling en tussenopbrengsten worden herkend als betekenisvolle uitkomsten.

Een derde implicatie is het belang van continuïteit en stabiliteit. Tijdelijke projecten kunnen waardevol zijn, maar herhaald wegvallen van ondersteuning ondermijnt vertrouwen en maakt leren opnieuw risicovol. Beleidskeuzes die langdurige relaties, stabiele infrastructuur en institutioneel geheugen mogelijk maken, sluiten beter aan bij procesmatige leerbewegingen.

Een aanvullende bevinding is het belang van brugfiguren en de sociale context als scharnier tussen iemands leefwereld en het vaak onoverzichtelijke leerlandschap. Voor kwetsbare volwassenen ontstaat de stap richting leren zelden door informatie alleen, maar eerder via een vertrouwde persoon die mogelijkheden helpt vertalen naar de eigen situatie, twijfel normaliseert en praktische drempels mee helpt oplossen. Zulke brugfiguren, bijvoorbeeld een begeleider, docent, bibliotheekmedewerker, jobcoach of community-werker, of een familielid, of vriend, bieden niet alleen doorverwijzing, maar ook erkenning en relationele veiligheid. Juist in een sociale context waarin leren eerder negatieve associaties oproept of als ‘niet voor mij’ wordt ervaren, kan een betekenisvolle relatie het verschil maken: zij vergroot het gevoel van competentie, maakt leren minder risicovol en helpt om kleine, haalbare stappen te zetten. Daarmee zijn brugfiguren niet alleen ondersteuners van deelname, maar ook dragers van

agency-ontwikkeling: zij creëren de condities waarin mensen leren opnieuw kunnen waarderen en volhouden.

Tot slot suggereert het proefschrift een verschuiving van activeringslogica naar mogelijk maken. Dat betekent niet dat leren vrijblijvend wordt, maar dat leren pas betekenis krijgt wanneer het aansluit bij iemands leven en perspectief. Regionale infrastructuren kunnen hierin een sleutelrol spelen door maatwerk, timing en begeleiding te bieden, en door een leercultuur te ontwikkelen waarin mensen in hun eigen tempo agency kunnen opbouwen.

Concluderend laat deze dissertatie zien dat leren voor kwetsbare volwassenen geen vanzelfsprekendheid is, maar ook geen onbereikbaar ideaal. Door leren te benaderen als capability en als proces dat zich afspeelt in wisselwerking met context, ontstaat een genuanceerd beeld van wat nodig is. De theoretische meerwaarde ligt in het verbinden van agency, omzettingsfactoren en leeropbrengsten, én in het expliciet maken van de dynamiek van ongelijkheid. De methodologische meerwaarde ligt in het serieus nemen van leerprocessen zoals mensen die ervaren, met methoden die reflectie en patroonherkenning combineren. De beleidsmatige waarde ligt in het openen van ruimte voor heroverweging: niet leren activeren als individuele plicht, maar regionale leerculturen ontwikkelen die leren weer denkbaar en haalbaar maken, omdat ze agency van kwetsbare volwassenen kunnen versterken.

About the author

Simon Broek is a senior researcher and policy expert in education, vocational education and training (VET), lifelong learning and skills development. He holds a Master of Arts in Philosophy from Radboud University Nijmegen, with minors in social science statistics, art policy, and classical and modern languages. He started his career in policy research at Research voor Beleid (later Panteia) in 2007. Since 2013, Simon has been Director of Ockham IPS. Over the past 18 years, he has led and contributed to numerous (international) studies for the European Commission, Cedefop, ETF, OECD, ILO and UNESCO, and Dutch Ministries focusing on education and training system reform, skills governance, qualifications frameworks, and adult learning policies. His work includes large-scale evaluations, comparative policy analyses and the development of conceptual and analytical frameworks to support evidence-based policymaking. Simon has extensive experience working in the Netherlands, across EU Member States and across the globe, linking comparative research with practical policy advice. Alongside his policy work, he has an established academic publication record, including peer-reviewed journal articles, book chapters and more than 150 international research reports and studies published by leading international organisations.

