

George Koulaouzides¹, Alexis Kokkos²
Hellenic Open University, Greece

Divergence and Convergence in Transformative Learning: Insights from the “Old Continent” and the “New World”³

Abstract: This paper is based on literature review. Its aim is, first, to explore which views carry prevailing ideas in the advancement of transformative learning in North America and, second, to compare them with the ideas of European writers in the field.

Key words: transformative learning, adult education, North America, Europe.

Introduction

Ever since Mezirow (1991) presented the transformative dimensions of adult learning in the field of education the further development of transformative learning is primarily coming from North America. The vast majority of the scholars who may be characterized as pioneers in this specific field of adult learning theory live and work in the US or Canada. Graduate programs related to the theory and practice of transformative learning are easier to be found in educational institutions located in North America. Moreover, most of the influential books on transformative learning have been published originally in the United States (e.g. Cranton, 2006; Mezirow, 1991; Mezirow & Associates, 2000; Mezirow, Taylor & Associates, 2009; Taylor & Cranton, 2013) and furthermore, the only journal focused on advancing the transformative learning theory is published in association with the American Association of Adult and Continuing Education.

¹ George Koulaouzides, PhD is a Tutor – Counsellor for the Hellenic Open University and an affiliate lecturer at the University of Macedonia, Greece. He is a founding member of the Hellenic Adult Education Association.

² Alexis Kokkos, PhD is a professor at the Hellenic Open University and a president of the Hellenic Adult Education Association.

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On the other hand, adult educators in Europe have formed communities within which they have been experimenting, researching and developing the theory and practice of transformative learning. Adult educators from various European countries have published and presented their transformative learning research work in conferences and scientific journals. These educators are actualizing their theoretical and practical potential within a social, political and cultural structure that has its own historic background from which given paradigms concerning the phenomenon of learning emerge. Most recently, a new promising network of researchers and practitioners of transformative learning has been launched within the structure of the European Society for Research on the Education of Adults (for more information see: <http://www.esrea.org/networks?l=en>).

From our point of view, a couple of questions emerge from this reality: (a) Given the central role of North American scholars in the development of transformative learning, which of their views carry prevailing ideas for the advancement of the field? (b) What are the meeting points and the divergences between these prevailing ideas in North America and the work of European adult educators in transformative learning? Our paper intends to discuss these questions through a review of papers originating from US, Canada and Europe.

Review efforts analogous to our own have been done in the past. Taylor (1997, 2007) reviewed an exhaustive body of published and unpublished research. In his first review (1997) the sources he studied were almost exclusively from the US while in the second 30% of the research papers he reviewed, were conducted by researchers outside the United States. In the aforementioned reviews, Taylor explored the main research trends and dimensions in transformative learning and his conclusions about the research designs and their respective issues were very informative about the orientation of the field mainly in North America. Recently, Taylor & Snyder (2013) conducted a critical review of the research on transformative learning theory from 2006 to 2010 and this time they included research efforts from different cultural contexts including a handful of papers written by European scholars. By reviewing a significant number of research papers, Taylor and Snyder, discussed critically the validity of the qualitative research designs in the field, they presented some of the additional theoretical frameworks that seem to offer innovative insights to the traditional perspective of the theory and they recommended to scholars and researchers that are committed to the development of the theory, to study deeper the role of context and to define very carefully the terminology which is used to present their findings. In addition, Kokkos (2013) reviewed a series of papers and presentations that were written by adult educators in order to examine how transformative learning is perceived by researchers in Europe. Our paper is adding to aforementioned studies because we

attempt to re-examine the European corpus of transformative learning papers but this time, and for the first time in transformative learning literature, in contrast with an exceptional collection of papers written by US and Canadian scholars. This collection of papers contains those texts that we considered as *influencing* for the development of transformative learning in North America.

Methodology: the Selection of the Papers

Our effort to understand the development of transformative learning as a theory and practice in the European and North American context includes reviewing hundreds of texts written in scientific journals or presented in conferences for more than 30 years. The exhaustive study of all the contributing texts to the development of TL theory seemed like a compelling project, which however is well situated beyond our available resources. Therefore, we decided to develop a framework of criteria that could reduce the number of texts to review, while at the same time lead us to the selection of a trustworthy collection of papers, which could serve our research goal. Apparently, the production of theoretical and empirical papers related to transformative learning in US and Canada is much larger compared to the relevant production in Europe. It is indicative that among the papers that have been published from 2003 to 2009 in JTE only 5% are written by European authors. This difference in quantities seemed to create a qualitative disharmony since for the European adult education context transformative learning is more an emerging field of research, while for North America transformative learning is a leading field for the advancement of adult education theory and practice. Considering all the aforementioned, we decided to apply the following strategy in the selection of the texts⁴.

For the North-American texts, we decided to constrain our research in the most significant scientific journals in the field of adult education and transformative learning. While we recognize the importance of other journals and conference proceedings an initial search made it clear that most of the work that we were looking for was published predominantly in *Adult Education Quarterly* and *The Journal of Transformative Education*. Within these two journals, we decided to look for the most influential contributions in the field, applying the following procedure. Firstly, we looked for papers that (a) had words or phrases that relate to the concept of the transformative learning theory within the title or the subtitle or the abstract of the paper (e.g. “transformative learning”, “transforma-

⁴ We have chosen to limit our review to English-language publications since most adult education publications are in English, which is also the language of the major international conferences.

tive education”, “transformative goals” and so on), (b) had direct references to Mezirow’s work or/and to alternative theoretical conceptions related to transformative learning and (c) were written by US or Canadian scholars. We decided to exclude papers written by Mezirow himself since we accept his writings as the foundation for all the further development of the theory and the inclusion of his work seemed as self-referential. Secondly, we decided to include papers between 1991⁵ and 2007, setting subjectively this three-year distance from our endeavour, as a threshold to the domain of influencing work. Then, we developed a list with the 50 most cited papers from each of the journals of our search using the tools provided by the SAGE publications web page and Scholar Google, and we looked for the intersection among these three sets. This process gave us a list of 33 papers that we numbered from [1] to [33]⁶. From these 33 papers, 23 are written in the US while 10 are written in Canada. Moreover, 25 papers were from the Journal of Transformative Education only 8 were from Adult Education Quarterly. We believe that this difference is expected since AEQ is publishing papers from the broader field of adult education, while JTE is dedicated to transformative learning and its fostering practices.

For the European texts we chose to draw data for the period 1991-2010 from those publishing houses who have shown significant publishing activity in the field of adult education, namely: a) SAGE, b) Taylor & Francis – Routledge, c) Wiley, d) NIACE and e) Emerald. Concerning the conference papers, we drew data from: a) the Transformative Learning Conferences and b) the SCUTREA Conferences, which is the European conference institution of University departments engaged in adult education. In the framework set by these resources we looked through the aforementioned criteria (a) and (b) for papers written between 1991 and 2010 by European adult educators, who developed the vast majority of their work in Europe. This process returned us 26 papers written by European adult educators that we numbered from [34] to [59]⁷.

⁵ We chose 1991 as the starting year of our search since in that year, Mezirow published the first complete description of his theory in the book titled *Transformative dimensions of adult learning*.

⁶ [1] Berger, 2004; [2] Cranton & Carusetta, 2004; [3] Cranton & Roy, 2003; [4] Courtenay, Merriam, Reeves & Baumgartner, 2000; [5] Courtenay, Merriam & Reeves, 1998; [6] Curry-Stevens, 2007; [7] Duerr, Zajonc & Dana, 2003; [8] Ebert, Burford & Brian, 2003; [9] Gunnlaugson, 2005; [10] Gunnlaugson, 2004; [11] Hart, 2004; [12] Hicks, Berger & Generett, 2005; [13] Johnson, 2003; [14] Karpiak, 2003; [15] Kitchenham, 2006; [16] Kovan & Dirkx, 2003; [17] McGregor, 2004; [18] McWhinney & Markos, 2003; [19] Merriam, 2004; [20] Moore, 2005; [21] Robertson, 1996; [22] Robinson, 2004; [23] Schapiro, 2003; [24] Scott, 2003; [25] Southern, 2007; [26] Taylor, 2003; [27] Taylor, 1997; [28] Taylor, 1994; [29] Tisdell & Tolliver, 2003; [30] Yorks & Kasl, 2006; [31] Yorks & Kasl, 2002; [32] Weddington, 2004; [33] Whitelaw, Sears & Campbell, 2004.

⁷ [34] Alhadeff, 2003; [35] Dominicé, 2003; [36] Duveskog & Friis – Hansen, 2007; [37] Duveskog & Friis – Hansen, 2009; [38] Duveskog, Friis – Hansen & Taylor, 2009; [39] Fenson & Chesser-Smyth, 2009; [40] Fetherston & Kelly, 2007; [41] Fleming, 2000; [42] Gray, 2006; [43] Harvey & Langdom, 2009; [44] Hunt,

Findings

The North American set of papers

The first thing that we identified about this set of papers was their *context*. Fifteen (15) papers are presenting work which is related to practices in the field of adult education (i.e. [4], [5], [6], [8], [15], [16], [17], [19], [21], [24], [25], [28], [30], [31], [33]). Among this group of papers we identified more specific settings like community education (i.e. [6], [8], [24]), citizenship education (i.e. [17]), environmental education (i.e. [16]), teacher's professional development (i.e. [15], [33]) and education of groups at risk of marginalization (i.e. [4], [5]). Twelve papers (12) are referring to academic environments, either to undergraduate or graduate education (i.e. [1], [2], [7], [10], [12], [13], [14], [20], [22], [23], [26], [29]). Only two (2) papers are situated in other educational settings like compulsory education (i.e. [11]) or special education (i.e. [32]). Three (3) papers are presenting pure theoretical approaches (i.e. [3], [9], [18]) while one is the well-known review by Taylor on the research development in transformative learning theory (i.e. [27]).

Regarding the *issues* of the papers that belong to this group we identified four thematic areas according to their main subject matter. The first area that is rather dominant in the group (15 papers) concerns methods and strategies, which contribute to the facilitation and fostering of transformative learning. The inquiry in this thematic area includes the examination of teacher – student relationships (i.e. [21], [23], [25]), methods for perspective transformation among privileged learners (i.e. [6]), expressive ways of knowing (i.e. [30]), contemplation (i.e. [11]), the development of authenticity by the educator as a parameter that leads to transformative learning experiences (i.e. [2]), identification of thresholds of transformations (i.e. [1]), meditation (i.e. [22]), aesthetic experience (i.e. [32]), autobiography (i.e. [13], [14]), spirituality (i.e. [7], [29]) and teaching belief changes (i.e. [26]).

The second thematic area includes six (6) papers that through their analysis try to enhance the theory of transformative learning with innovative views. In two papers (i.e. [9], [10]) we identified an effort to combine transformative learning theory with Ken Wilber's integral metatheory emphasizing in the spiritual elements of learning. Deliberation theory is reconceptualised by McGregor (2004) who by introducing it as a more emotive process argues that the adult educator

2009; [45] Illeris, 2003; [46] Illeris, 2004; [47] Inglis, 1997; [48] Inglis, 1998; [49] Karalis, 2010; [50] Kokkos, 2009; [51] Nieuwenhuis & Van Woerkom, 2007; [52] Preece, 2003; [53] Taylor, Pettit & Stackpole – Moore, 2005; [54] Taylor & Pettit, 2007; [55] Tosey, Mathison & Michelli, 2005; [56] Van Woerkom, 2010; [57] Wilhelmson, 2005; [58] Wilhelmson, 2006; [59] Wilner & Dubouloz, 2010.

has an important role as “*a catalyst for transformative learning in the deliberative process...*” (p. 104). The role of affect in transformative learning is discussed by Yorks & Kasl (2002) while Cranton & Roy (2003) enrich the theory of transformative learning with insights from depth psychology and humanism. Finally, within this thematic area we identified an interesting, culturally constructed effort to describe transformative education as an archetypal form based on Native American ancient healing rituals (McWhinney & Markos, 2003).

The application of transformative learning theory in practice and its implications is the third thematic area which includes six (6) papers (i.e. [4], [5], [12], [15], [20], [33]). Lastly, the fourth thematic area is the one within which critique on the transformative learning theory is developed. In this area we identified five (5) papers (i.e. [8], [16], [19], [24], [28]). Here, Ebert, Burford & Brian (2003) compare the theory as developed by Mezirow with the theory and practice of Myles Horton, and Taylor (1994) argues about the partial examination of intercultural competency as a transformative learning pattern. However, we believe that the most influential arguments in this thematic area are done by: (a) Merriam (2004) who is “*calling*” for an expansion of transformative learning theory with “*...more ‘connected’, affective, and intuitive dimensions on an equal footing with cognitive and rational components*” (pp.66-67), (b) Kovan & Dirks (2003) who by discussing the role of affect, conclude that Mezirow’s approach “*understates ... how emotions, imagination, and spirituality are actively involved in and central to this form of learning*” (p. 102) and (c) Scott (2003) who suggests that Mezirow, “*...decoupled transformative learning from the dimension of societal structures in the mechanisms of transformative learning theory*” (p.265). We did not include Taylor’s review (1997) in any of the abovementioned thematic areas since we thought that the specific paper had a broader thematic character.

Concerning the *attitude* of North American writers *towards the theoretical framework of transformative learning*, a first finding is that the vast majority of the papers (30 out of 33) had citations in the work of Mezirow. Only three (3) ones were discussing transformational learning processes without reference to Mezirow’s work (i.e. [11], [13] and [32]). This finding is justified from the settings of these papers. The authors discuss the potential of contemplation as a learning path in compulsory education, the relation between education and aesthetic experience in special education as well as autobiography as a method to foster transformative learning in undergraduate university education. However, in all the aforementioned settings Mezirow’s conception is not the leading learning theory.

The work of Mezirow's associates⁸ is also, as expected, dominant in the references of this group of texts. The most frequently cited were the following: Brookfield and Taylor whose work is cited in 15 papers, Kegan whose work is cited in 14 papers, Cranton in 12, Dirkx in 10 and Daloz in 6 papers. The work of Boyd and/or Myers was found in five papers, while eleven (11) texts are discussing the transformative dimensions of education and have references to Freire's work, a number which we consider rather low, considering that his work is situated in the foundations of the development of transformative learning theory.

Finally, since our paper is discussing the divergence and convergence in the approaches of transformative learning between the North American and the European adult education contexts we looked within this group of papers for references in the work of European scholars. Fourteen papers belong to this category (i.e. [2], [3], [5], [6], [9], [17], [18], [20], [21], [24], [25], [31], [32] & [33]). More specifically, five of the reviewed papers (i.e. [3], [9], [17], [20], [25]) refer during their analysis to the work of Jurgen Habermas, something that is expected since communicative rationality is one of the epistemologies that support the transformative learning theory. Six papers refer to the work of Peter Jarvis (i.e. [2], [3], [5], [24], [31], [33]) and four papers refer to the work of Carl Jung (i.e. [2], [3], [21], [24]). References to other European scholars are rather scarce. Three papers refer to Heidegger (i.e. [3], [25], [32]) three papers refer to Foucault (i.e. [6], [9], [32]), one to Sartre (i.e. [32]), one to Gregory Bateson (i.e. [18]) and one in the work of Pierre Bourdieu (i.e. [9]) although the work of the latter regarding the notion of *habitus* could add significantly to the understanding of the social construction of frames of reference.

The European set of papers

As far as the *context* is concerned the vast majority of the texts written by Europeans are not situated in a particular setting since they constitute pure theoretical approaches (i.e. [34], [45], [46], [47], [48], [49], [50], [52], [53], [55], [56], [59]). This finding reveals a sort of preference of the European writers on theoretical research. Furthermore, their attitude is also an indication that a significant nucleus of people that implements transformative learning in various settings has not been yet created in Europe. On the other hand, texts by European writers that are situated in the context of higher education are only three (i.e. [40],

⁸ As associates we define those scholars who have worked extensively on transformative learning and their conceptions relate to Mezirow's theory and co-define the theoretical framework of transformative learning. Among the most well known of these scholars are: Belenky, Brookfield, Cranton, Daloz, Dirkx, Dominicé, Duveskog, Elias, Friis-Hansen, Gould, Green, Kasl, Kegan, King, Kitchener, Lipson Lawrence, Marsick, Taylor (Ed), Taylor (Kathleen), Tisdell, Yorks.

[44], [54]), while the texts written by North Americans situated in such context are twelve as we stated earlier. This is a clear indication that in the Universities of US and Canada there is a clear existence of many more cores of scholars who are working on the implementation of transformative learning.

The rest papers of the European set, regarding the context, refer to community development (i.e. [36], [37], [38], [43], [57]) to professional development (i.e. [35], [39], [42], [51], [58]) and to cultural context (i.e. [41]).

Regarding the *issues*, most of the European papers (16) do not deal with the very nature, the concepts, the components and the applications of transformative learning theory. They are focused on the exploration of various other subjects in which the writers are interested, such as learning processes (i.e. [40], [41], [42], [45], [46], [49], [56], [57]), research methods (i.e. [35], [54]), social change (i.e. [47], [52], [53], [59]) and workplace processes (i.e. [51], [58]). These 16 papers have few references on the theoretical framework of transformative learning, and the writers have the obvious objective to show that they are informed about this theoretical approach, and therefore include further depth and argumentation in the elaboration of issues on which they intensively work. On the contrary, all the papers of the North American set are integrated into the framework of transformative learning theory.

The issues that the rest of the European papers deal with, in the framework of transformative learning, concern mainly two subjects: the methods that reinforce transformative learning processes (i.e. [44], [50], [55]) and the relationship between transformative learning and social action (i.e. [36], [37], [38], [43]), a dimension that is included in the European tradition of critical pedagogy for emancipation. Only one paper tries to enhance the theory of transformative learning with innovative views (i.e. [34]) and one other deals with its application in practice (i.e. [39]). Finally, one paper sets in its epicenter the critique to Mezirow's conception (i.e. [48]). The numbers of papers that belong to the last three categories are respectively six, six and five in the North American set. This last finding strengthens the indication that the discourse around transformative learning theory is more developed in North America compared to Europe.

As far as the attitude *of the European writers towards transformative learning theory* is concerned, a first ascertainment would be that, as the North Americans do too, almost all of them connect their explorations on transformative learning theory with Mezirow's work: 24 papers have citations to his books and papers and only two do not have a relative reference. References to other scholars of transformative learning theory are fewer compared to the North American set of

papers. The most frequently cited are Taylor, whose work is cited in 8 papers, as well as Brookfield and Cranton, found respectively in 7 papers.

Concerning the references to scholars that have stated alternative theoretical views of perspective transformation, 13 out of 26 papers contain references to the work of Freire and his colleague Shor, while the respective references in the North American set are proportionally fewer (11 out of 33). This finding shows that the Freirean concept of critical pedagogy still maintains a crucial position in European adult educators' approaches. On the contrary, only two papers – against 5 of the North American set – have references to the psycho-analytic work of Boyd and Myers which acknowledges the importance of the learning processes that take place within the unaware.

As far as European writers' attitude towards the approach of Mezirow are concerned, in most cases they are critical, stating that his work has strong cognitive emphasis and underestimates other important ways of knowing, like the intuitive and emotional dimensions of learning (i.e. [41], [45], [46], [55]), the collective view (i.e. [43], [58]), the relational processes (i.e. [38]), the dimension of social change (i.e. [47], [48], [54]), the impact of spirituality (i.e. [52]) and the unconscious modalities (i.e. [40], [44]).

Finally, all the papers of the European set contain a lot of references to important European scholars whose works are related to critical thinking and social dimensions of learning, such as Adorno, Bourdieu, Foucault, Gagné, Heron, Horkheimer, Illeris, Jarvis and others.

Conclusions

The development of transformative learning theory has been for many years, mainly, a matter of North American writers. Their most cited, and thus influential, work of the last twenty years, which were examined in this paper, is clearly framed within the transformative learning theory as it was proposed by Mezirow and developed by his associates. This work includes issues that refer to ideas; methods and strategies that promote perspective transformation; enhance the theory of transformative learning with innovative views and reinforce its practical application.

On the other hand, the majority of the European writers that deal with transformative learning do not situate their approaches in the core of the “traditional” transformative learning theoretical framework. They are rather based on other theoretical backgrounds that have been developed in Europe. The European scholars use transformative learning theory as an additional resource for

a more integrated investigation of issues on which they work. Therefore, they combine their approaches to transformative learning theory with the exploration of the work of a wide range of important European scholars.

Based on the above, we believe that the integration of more ideas from European scholars, in the development of transformative learning theory could broaden its base and offer an additional potential. Likewise, we think that European writers would certainly enrich their approaches if they include in their work more components of the continuous work of North American adult educators, theorists and researchers. Evidently, both sides could obtain much if they were more actively engaged with the ideas of each other.

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George Koulaouzides⁹, Alexis Kokkos¹⁰
Helenski otvoreni univerzitet, Grčka

Divergencija i konvergencija u transformativnom učenju: Ideje Starog i Novog sveta¹¹

Apstrakt: Cilj rada je da istraži ideje koje preovlađuju u koncepcijama transformativnog učenja, a razvijene su u Severnoj Americi. Takođe, identifikovane perspektive su upoređene sa idejama evropskih istraživača.

Ključne reči: transformativno učenje, obrazovanje odraslih, Severna Amerika, Evropa.

⁹ Dr George Koulaouzides je tutor – savetnik Helenskog otvorenog univerziteta i predavač na Makedonskom univerzitetu u Grčkoj. On je jedan od osnivača Helenske asocijacije za obrazovanje odraslih.

¹⁰ Dr Alexis Kokkos je profesor na Helenskom otvorenom univerzitetu i predsednik Helenske asocijacije za obrazovanje odraslih.

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