ISSN 0354–5415
UDK 37.013.83+374

Broj 11, decembar 2023.

Andragoške studije

Časopis za proučavanje obrazovanja i učenja odraslih

Andragogical Studies

Journal for the Study of Adult Education and Learning

Andragoške studije
Andragoške studije su časopis za proučavanje obrazovanja i učenja odraslih, naučne orijentacije, posvećen teorijsko-koncepcijskim, istorijskim, komparativnim i empirijskim proučavanjima problema obrazovanja odraslih i celoživotnog učenja. Časopis reflektuje i andragošku obrazovnu praksu, obuhvatajući širok spektar sadržaja relevantnih ne samo za Srbiju već i za region jugoistočne Evrope, celu Evropu i međunarodnu zajednicu. Časopis je tematski otvoren za sve nivoe obrazovanja i učenja odraslih, za različite tematske oblasti – od opismenjavanja, preko univerzitetskog obrazovanja, do stručnog usavršavanja, kao i za učenje u formalnom, neformalnom i informalnom kontekstu.

Izdavač
Institut za pedagogiju i andragogiju, Univerzitet u Beogradu, Filozofski fakultet
Poštanska adresa: Čika-Ljubina 18–20, 11000 Beograd,
e-pošta: ipa.as@f.bg.ac.rs, telefon: 00381-11-3282-985.

ISSN: 0354–5415 (Štampana izdanja)
ISSN: 2466-4537 (Online izdanja)
UDK: 37.013.83+374

Andragoške studije izlaze od 1994. godine dva puta godišnje. Uređivačku politiku vodi **Institut za pedagogiju i andragogiju**, Univerzitet u Beogradu, Filozofski fakultet, Čika-Ljubina 18–20, 11000 Beograd, u saradnji sa **Društvom za obrazovanje odraslih**, Garsije Lorke 9, 11060 Beograd. Izdavanje časopisa podržava Ministarstvo prosvete, nauke i tehnološkog razvoja.

Katalogizacija časopisa: Narodna biblioteka Srbije, Beograd

Andragoške studije su časopis otvorenog pristupa koji je odlukom Ministarstva prosvete, nauke i tehnološkog razvoja Republike Srbije kategorizovan kao časopis međunarodnog značaja (M24). Andragoške studije su na listi European Reference Index for the Humanities and Social Sciences (ERIH PLUS) ustanovljene kao časopis međunarodnog autorstva.

Indeksiranje časopisa: Narodna biblioteka Srbije (Beograd) i Konzorcijum biblioteka Srbije (kobson.nb.rs); Srpski citatni indeks (http://scindeks.ceon.rs); European Reference Index for the Humanities and Social Sciences (ERIH PLUS) (https://dbh.nsd.uib.no/publiseringskanaler/erihplus/); Biblioteka nemačkog Instituta za obrazovanje odraslih DIE, Bon.

ISSN 0354–5415
UDK 37.013.83+374

Broj 11, decembar 2023.

Andragoške studije

Časopis za proučavanje obrazovanja i učenja odraslih

Andragogical Studies

Journal for the Study of Adult Education and Learning

AS Andragoške studije
broj 11 decembar 2023.

Sadržaj

Članci

Andragogical Studies
Number 11 december 2023

Contents

Articles

Članci

Articles

Andragoške studije, issn 0354–5415, broj 11, decembar 2023, str. 9–37
© Institut za pedagogiju i andragogiju; Originalni naučni rad
UDK 378:[374.7:331.102.24(436)(71)(439)
doi: 10.5937/AndStud2302009K

Elena Klimkina[1]
Eötvös Loránd University (ELTE), Hungary

Sarah-Maria Rotschnig[2]
University of Klagenfurt, Austria

Jiin Yoo[3]
University of British Columbia, Canada

Lisa Breitschwerdt[4]
Julius-Maximilians-Universität Würzburg, Germany

Leslie Cordie[5]
Auburn University, Alabama, USA

Paula Guimarães[6]
Universidade de Lisboa, Portugal

Academic Professionalisation and Hybrid Professionalism in Adult Education[7]

Abstract: Discourse on professionalisation and professionalism is a longstanding focus in adult education practice and research. Drawing on the theoretical framework of Freidson (2001) and Noordegraaf (2007, 2015), this qualitative research combined an explorative method and an in-depth analysis (Nutt Williams & Hill, 2012; Williams & Morrow, 2009*)*. It focussed on the comparison of adult education programmes at the Master's level in three countries (document analysis), and the critical reflection on logics of action three adult educators of the referred countries themselves use to describe their work (semi-structured interviews). Thematic content analysis was used to examine data concerning academic professionalisation and professionalism in adult education. Findings showed that the extent of promoting professionalisation appeared differently in each country,

[1] Elena Klimkina, MA, is a PhD student at the Eötvös Loránd University (ELTE), Hungary (eklimina@student.elte.hu).

[2] Sarah-Maria Rotschnig, MA, is an Assistant at the University of Klagenfurt, Austria (Sarah-Maria.Rotschnig@aau.at).

[3] Jiin Yoo, MA, is a PhD student at the University of British Columbia, Canada (jiinyoo@student.ubc.ca).

[4] Lisa Breitschwerdt, PhD, is a researcher at Julius-Maximilians-Universität Würzburg, Germany (lisa.breitschwerdt@uni-wuerzburg.de).

[5] Leslie Cordie, PhD, MBA, is an Associate Professor at Auburn University, Alabama, USA (lesliecordie@auburn.edu).

[6] Paula Guimarães, PhD, MA, is an Assistant Professor at the Instituto de Educação, Universidade de Lisboa, Portugal (pguimarães@ie.ulisboa.pt).

[7] Elena Klimkina, Sarah-Maria Rotschnig and Jiin Yoo: corresponding authors, methodological implementation (conducting interviews) and data analysis, writing of the article with focus on the results and conclusion; Lisa Breitschwerdt & Paula Guimarães: conceptualisation of the article, writing of the article with focus on the theoretical and methodological framework, providing feedback in the data analysis process; Leslie Cordie: feedback during the writing process, final editing and formatting of the article.

depending on the social and historical contexts and the interplay among several factors within which higher education institutions offering programs on adult education are settled. In addition, the practice of adult educators expressed by themselves involved several logics of action. This study highlights the presence of hybrid professionalism in adult education.[8]

Keywords: adult education, academic professionalisation, hybrid professionalism, logics of action, comparison

Introduction

Discourse on professionalisation and professionalism has long been an important topic in adult education research, policy, and practice (Canário, 1999; Jütte et al., 2011; Lattke & Jütte, 2015; Milana & Skrypnyk, 2009). As a heterogeneous and complex field of practice, interwoven with many other functional systems (e.g., regarding legal rules, practice norms or financial regulations, among others), adult education work contexts place high demands on those who are working in them. Therefore, professionalisation and professionalism have been discussed and defined by several authors in relation to the field of adult education (Doyle et al., 2016; Gibson et al., 2017). Professionalisation of adult educators can take place both within formal settings, like (academic) education (Egetenmeyer & Schüßler, 2012) or in further training programmes (UNESCO Institute for Lifelong Learning et al., 2021), as well as informally, in the field activity itself. Professionalism relates to how one interprets, reflects, and reacts autonomously to unpredictable and unstandardised situations in an individual's performance (Nittel, 2000; Tietgens, 1988). It is based on specific expert knowledge and competences developed during an individual's career.

In present times, social situations are becoming more complex and characterised by many significant transformations (Evetts, 2011). On a global level, the Covid-19 pandemic is just one example of such a transformative force that had immediate and overarching influence on the design of teaching and learning contexts worldwide. Such transformations raise the question of how adult educators are themselves educated and how they deal confidently

[8] We thank all the participants who engaged in the comparative group "Activities, competences and hybrid professionalism in adult education" during the "Adult Education Academy – International and comparative studies in adult education and lifelong learning" taking place in February 2023 at the Julius-Maximilians-Universität Würzburg, Germany. The work and discussions within this group and its international members were the starting point of this article and enriched authors' perspectives.
This work was supported by the ERASMUS+ Blended Intensive Programme (BIP), Grant No. 2022-1-DE01-KA131-HED-000057161-1 and the Human Dynamics Centre (HDC) of the Faculty of Human Sciences of the Julius-Maximilians-Universität Würzburg.

and effectively within the changed conditions of their domains of activity. Clearly, professionalism of adult educators is linked to the broad challenges these practitioners are increasingly confronted with, along with the diverse demands for action in their daily work. In such complex contexts, adult educators have to balance between different demands they encounter in their daily work (Egetenmeyer et al., 2019; Freidson, 2001; Noordegraaf, 2007) developing several logics of action.

To gain initial insight into professionalisation and professionalism of adult educators, the following research questions were established to guide this study:

- How are structures of academic professionalisation, namely the Master's level degree programmes, established in the countries of Austria, Canada, and Hungary?
- How are the logics of action understood by adult educators in relation to their work?

In the first section of this article, we explore academic professionalisation as a path towards meeting the initial education challenges faced in the field of adult education. Further, based on the changing contextual conditions of work, we discuss how professionalism deals with the emerging, sometimes conflicting, demands professional adult educators are facing in their daily work. In the second section, we discuss the methodology, introduce the research participants, and present our approach based on a comparison of three study programmes in adult education at the Master's level in Austria, Canada, and Hungary; this comparison is followed by an in-depth analysis of the different logics of action based on data from the three interviews conducted with adult educators working in different practice fields in the above three countries. The fourth section presents our findings from the comparison of the programmes, as well as our in-depth analysis of the interviews. The article ends with the presentation of the main conclusions and arguments for further research.

Theoretical framework

Professionalisation can be understood as the process of developing specific expert knowledge and competences within a field of practice (Egetenmeyer & Käpplinger, 2011). This process often takes place in formal structures, such as higher education institutions (Bachelor's, Master's, and PhD programmes). The complexity of the domains of professional activity usually requires an academic education (Egetenmeyer & Schüßler, 2012) in order to "solve complex requirements at a high scientific and theoretical level" (Gieseke, 2018, p. 61). According to several researchers, this path of academic professionalisation is focused on the acquisition of scientifically based knowledge and competences (Jütte et al., 2011; Lattke & Jütte, 2015; Milana & Skrypnyk, 2009). They have emphasised practical domains in the discipline, along with the development of the basic skills for acting independently, being able to interpret individual practice situations, and to reflectively transfer the theoretical knowledge into these situations.

In parallel, it is essential to consider that work contexts are important for knowledge and competence development. In fact, during the performance of professional activities, new knowledge and competences are developed when facing challenging situations. In this sense, the capacity of interpreting, reflecting, and reacting autonomously to unpredictable and unstandardised situations in individual practice is based on specific expert knowledge and competences (Nittel, 2000; Tietgens, 1988). Demands of professional action, which can be further developed during the individual's career, influence the ways adult educations think and do their work.

Freidson (2001) created an ideal-typical model for conceptualising the interconnectedness of different logics influencing concrete situations in the specific field of work. This model included three logics that do not completely represent reality, yet their interpretation and illustration can be suitable to examine the world of work for adult educators. The first logic is professionalism, understood as a specialised activity based on scientifically related knowledge. Professionalism is socially recognised and associated with a special status based on this acquired knowledge (Breitschwerdt, 2022). This logic is characterised by autonomy, which means that the activity is controlled self-responsibly by specific practitioners and can be legitimised by the corresponding proof of qualifications from academic education and training. Professionalism is thereby an "intellectual construct and not a portrayal of any real occupation" (Freidson, 2001, p. 127). The logic of professionalism is different to the two other ideal-typical model of logics of action: one is the market logic, characterised by supply and demand and by the assumption that all action in the context of work has consumption and prosperity as its main goals; and the other is bureaucratic logic, composed of hierarchy, control, and administration.

In practice, adult educators do not act only following the logic of professionalism. They are always confronted with other challenges and requirements arising within the other logics of action at the same time. The challenge for professional action lies in balancing between the three logics, which are partly contradictory and frequently conflicting. Consequently, a changed perspective on professionalism, which considers that professional action is not free of challenging demands arising from the different logics of action, is developed. Noordegraaf (2007) thus adopted the ideal-typical model of Freidson (2001) and showed the necessity of hybrid professionalism to understand the conflicting demands in work. The core of hybrid professionalism is the connection of the different logics of action and the interplay between classical professionalism and new requirements in the present working world (Breitschwerdt, 2022). The relational aspect of this concept brings a new perspective to professionalism as the interdisciplinary knowledge and interactive skills are considered more critical to work. In this regard, Noordegraaf (2007) stated that "[P]rofessionals know how to operate in organised, interdisciplinary settings that cannot be organised easily; they know that cases, clients, costs, and capacities are interrelated" (p. 775).

Noordegraaf (2007) described hybrid professionalism as a reflexive connection between work, organisational action, and social conditions. The key is not only to perceive this interconnectedness, but also to make it meaningful for one's own professional actions. In doing so, it is important to apply reflexive control, and to strengthen the idea of professionalism in the respective work contexts (Breitschwerdt, 2022). Such reflexive control can enable a conscious approach to the interconnection of the different logics of action, and thus, improve one's own professional actions. In many cases, practitioners, including adult educators, are increasingly confronted with diverse demands of action in their daily work. In such complex contexts of action, practitioners no longer rely only on expert knowledge and the logic of professionalism. They must take into account the increasingly various demands and requirements of other action logics (e.g., bureaucratic logic or the market logic) (Freidson, 2001). Thus, professionalism becomes increasingly hybrid professionalism (Noordegraaf, 2007), which emphasises balancing between the different logics of actions. For the field of adult education, hybrid professionalism means that tasks completed by adult educators are not exclusively pedagogical. For example, these practitioners must deal with issues related to quality management, standardisation, and funding, in addition to teaching and learning (Breitschwerdt et al., 2019). Such a balance determines and is determined by the daily professional actions of adult educators, as they must combine different logics of action in their professional activities (Egetenmeyer et al., 2019).

Methodology

The research method used in this study is qualitative (Boeren, 2018; Fejes & Nylander, 2015; Lichtman, 2023). As Nutt Williams and Hill (2012) and Williams and Morrow (2009) suggested, a consensual qualitative research based on an exploratory method supported by a document analysis allowing educational comparison of higher education programmes at the Master's level in three different countries was achieved in this article. This was followed by an in-depth analysis established on semi-structured interviews allowing a comprehensive discussion of logics of action expressed by adult educators themselves about their work. The interviews provided focus on the work practice directly from the point of view of adult educators. Thematic content analysis was the data interpretation technique used both for documents and interviews collected.

The exploratory method was used when examining the information on higher education programmes at the Master's level of adult education. The initial formal education that adult education practitioners may acquire before acting as adult educators is one of the most discussed issues in academic professionalisation (Egetenmeyer & Käpplinger, 2011). These programmes, called structures of academic professionalisation (Egetenmeyer & Schüßler, 2012), are a significant component in the adult educators' professional development. The first step of the data collection prompted a discussion about the structures of academic professionalisation of adult educators. These structures included higher education paths that might be followed by those willing to become adult educators, such as knowledge and competences (Egetenmeyer et al., 2019). It assumes that academic professionalisation, through formal higher education programmes, like Bachelor's, Master's, and PhD programmes, influence the adult educators´ knowledge and competence.

Data from three particular adult education Master's programmes in three countries, Austria, Canada, and Hungary, (Table 1) were collected. These countries were chosen because of their distinct adult education policies, practices, and main educational approaches preferred in projects and activities implemented (Lima & Guimarães, 2011). Specifically, we selected the University of Klagenfurt (Austria), the University of British Columbia (Canada), and the University of Pecs (Hungary) as those representing each country's Master's programmes. Based on the official website of each programme, we conducted a thematic content analysis to identify specific structures of academic professionalisation (University of British Columbia, 2023; University of Klagenfurt, 2020, 2023; University of Pecs, 2020). Comparisons amongst the programmes were made using the following four steps: 1) descriptive juxtaposition of Master's degree programmes selected for analysis; 2) analytical juxtaposition; 3) descriptive comparison; and 4) analytical comparison (Egetenmeyer, 2016).

Table 1. Overview of Master's Degree Programmes

Master Programme	University & Country	Programme Structure	Curriculum/Content	Documents Analysed
Adult Learning and Education and Vocational Education and Training	University of Klagenfurt, Austria	4 semesters 120 ECTS Master of Arts	Fundamentals of Education and Educational Science	Website (https://www.aau.at/studien/master-erwachsenenbildung/#toggle-id-1) Module Handbook (https://www.aau.at/wp-content/uploads/2020/05/Mitteilungsblatt-2019–2020–20-Beilage-11.pdf)
Adult Learning and Education	University of British Columbia (UBC), Canada	4 terms: 30 credits or 27 credits of coursework plus a graduating paper/project	Historical and Philosophical Foundations of Adult Learning and Education, Adult Education Program Planning Theory, Theory and Research on Adult Learning), one research method course and several electives	Website (https://edst.educ.ubc.ca/programs/adult-learning-and-education/) Module Handbook (https://edst.educ.ubc.ca/files/2013/05/ale-program-brochure-may-2013-upd1.pdf)
Andragogy/ Adult Education	University of Pécs, Hungary	4 semesters 120 ECTS Master of Arts	Theory and practice of adult learning and education as a development process of adults, societies and cultures in different life contexts considering the lifelong learning concept	Website (https://international.pte.hu/study-programs/ma-adult-education-andragogy) Module Handbook (https://international.pte.hu/sites/international.pte.hu/files/doc/Adult%20Education%20MA_UP_17_03_2021.pdf)

This study included an in-depth analysis based on semi-structured interviews with three adult educators in the selected countries. The semi-structured interviews (Harvey-Jordan & Long, 2001) focused on analysing the opinions of the adult education professionals in terms of the adult educators' professionalism, and the logics of action. The underlying perspective to the research was that knowledge and competences can be learned in adult education, that they can be developed not only in higher education settings, but within work contexts as well. As a window into professional practice, the interviews allowed a micro analysis of how the interviewees, namely adult educators, perceived their work. The interviews were based on a set of open-ended questions on the topic of the adult educators' professionalism. Various issues of the adult educators' work, along with the problems and challenges they faced in everyday professional activity, were explored in-depth.

The interviewees were selected having in mind the specific adult education domain in which they were working, such as adult education management, or adult education and teaching (e.g., Zarifis & Papadimitriou, 2015). All the chosen interviewees had achieved a MA and/or PhD at the universities selected for this research. The final criterion was that they had more than five years of professional experience as an adult educator. This characteristic follows Sennett's (2008) statement that at least five thousand hours are needed to make someone a professional or to develop craftsmanship. The three interviewees and their demographic characteristics are shown in Table 2.

Table 2. Characteristics of Interviewees (A, B, and C)

	Age	Gender	Qualification	Experience in AE	Current Job Description
A (Austria)	37	male	Master & doctoral degrees in AE	Experience in different fields of AE, e.g., in an adult education centre (VHS9)	Pedagogical director of an institution offering further training for adult educators
B (Canada)	60	female	Master's degree in adult education	Working in the field for 21 years; Education of community-based local farmers; ESL teacher in Asian countries; University business school to support visiting scholars from abroad	Retired in 2022. Last position: program coordinator/ designer (liberal arts education) in a higher education extended learning centre
C (Hungary)	36	female	PhD in Adult Education	Teacher of foreign languages (public high school & private language school for adults); teacher and researcher of education of older adults (Erasmus+ 60 Project)	Assistant professor at the University in the field of adult education

The collected data were examined through thematic content analysis (Anderson, 2007). Krippendorf (2019) argued that content analysis allows replicable and valid inferences on texts (referred to as aims on higher education websites or in the context such as logics of action expressed by the adult educators in the interviews). The documents and interviews were therefore analysed using deductive categories, as the ones referred to above, understood as themes for analysis. These categories support thematic content analysis and were established as an attempt to make inferences by objectively and systematically describing and interpreting specific characteristics of the data. The discussion about and interpretation of the

[9] Acronym for *Volkshochschule*, adult education local centre in German.

data were based on the theoretical frameworks of academic professionalisation (Egetenmeyer et al., 2019) and logics of action in professional practice (Freidson, 2001; Noordegraaf, 2007).

Findings from Comparing Structures of Academic Professionalisation

In our first discussion of the findings, we highlight the three Master's programmes in higher education institutions that attempt to professionalise adult educators through degree offerings.

University of Klagenfurt Master's Programme

The Master's programme in Adult Learning and Education and Vocational Education and Training at the University of Klagenfurt lasts four semesters and comprises 120 ECTS[10]. A Bachelor's degree in a professionally appropriate subject is a prerequisite for enrolling in this programme. The language of instruction is German, and the programme is completed with the academic degree Master of Arts (University of Klagenfurt, 2023). The Master's programme comprises various subareas characterised by diversity in content and domains. Subjects included Fundamentals of Education and Educational Science, In-depth Fundamentals of Adult Learning and Education and Vocational Education and Training, Specific Learning and Educational Theories, Research Fields and Methods, and a Master's Seminar and Electives. The main elements of the programme also include the writing of a Master's thesis, and completion of various free electives and a practicum. The students have to complete 150-hour mandatory internship. The content and curricula cover the analysis, design, and argumentation of formal teaching-learning settings of adult learning and education and vocational education and training, as well as accompaniment, analysis, and promotion of informal and self-organised learning of adults. The Master´s programme focuses on environments in teaching and learning, educational management, research institutions, projects and other areas of adult learning and education and vocational education and training (University of Klagenfurt, 2023).

[10] ECTS – European Credit Transfer and Accumulation System; 1 ECTS = 25 to 30 hours working/studying time.

The University of British Columbia (UBC) Master's Programme

The Adult Learning and Education (ALE) programme at the University of British Columbia (UBC) is the oldest graduate adult education programme in Canada, as well as one of the oldest in North America as it was established in 1957 (Selman et al., 1998). This programme aims to help students understand the diverse contexts in which adult learning occurs. Students explore the roles of adult educators from a wide variety of theoretical, conceptual, and philosophical perspectives, with particular focus on social justice, community development and democratic engagement (University of British Columbia, 2023).

There are several diploma, certificate, and degree options within the ALE programme, which target diverse adult educators; they have different purposes and timeframes in relation to gaining the credentials. Among them, the Master of Education (MEd) is the oldest master's programme in adult education at UBC. The MEd is a professional degree for those who wish to improve their knowledge and skills as practitioners in any adult education setting. Students take three core courses (Historical and Philosophical Foundations of Adult Learning and Education, Adult Education Program Planning Theory, Theory and Research on Adult Learning), one research methods course, and several electives, which can include courses in other departments and disciplines. Students can complete the programme with 30 credits or 27 credits of coursework, plus a graduating paper/project focused on an issue or concern in their field of practice (University of British Columbia, 2023).

University of Pecs Master's Programme

In response to the emerging demand for professional adult educators on the national labour market, the University of Pecs launched a Master's Degree (MA) programme in Andragogy/Adult Education (AE) at the Faculty of Humanities and Social Sciences in 2006. The programme was initially offered in Hungarian and later in English (2019) as an international programme (University of Pecs, 2020). Although there are 65 universities in the country, this is the only MA programme aimed at training adult educators. Students attending it study andragogy as a Single Honours degree. Its graduates can pursue careers in organisations providing both formal and non-formal adult education and training services, as well as in educational policy making, counselling, and advising.

The programme has a standard four semesters with 24 mandatory and optional subjects in the curriculum, and a required workload of 120 ECTS.

Although the programme integrates a variety of teaching, learning and assessment methods (seminars, lectures, research projects, distinct kinds of group work and individual assignments), the main approach is learner-centred, which is reflected in the programme structure. The mandatory courses combine theoretical topics (andragogy, gerontology, psychology of adult learning, theory of science, history and politics of AE, active citizenship, AE ethics, etc.), applied disciplines (human resource development and counselling, curriculum development and quality in AE, managing AE institutions and projects, e-learning, etc.), policy related modules (the role of law in AE, labour market-related knowledge and policy of the European Union, sociocultural aspects of adult education in Europe, etc.), along with methodology and research focused courses (adult education research and development, theory and practice of empirical research, methodologies of teaching and learning, assessment and evaluation). The programme also integrates two types of practicums: a research practicum including thesis consultations and practical placement in an organisational setting (160 hours).

Discussion about the Similarities and Differences among Master's Programmes

Based on the descriptions of the Master's programmes in Austria, Canada, and Hungary, we identified similarities and differences among the programmes. The comparison focused on adult education as a field of practice in each of the countries selected by appraising the similarities of historical developments in Austria and Hungary and the differences in Canada.

Austrian Programmes

The beginning of Austrian adult education dates to the Enlightenment period in the 18th century, where the focus was to educate and train people (Gruber & Lenz, 2016). The economic roots of this field of education lie in industrialisation, which increased the demand for a qualified workforce. In addition, the question concerning equality in society, namely participation in general education to create better living and learning conditions for all, played a role in adult education. Yet, the greatest developments in adult education in this country date back to the 20th century, the 1970s, which brought many changes. The 1973 Adult Education Law regulated funding for adult education by the State for the first time

(Gruber & Lenz, 2016)[11]. The basic requirements institutions extending adult education must fulfil have been defined in this context[12].

Master's degree programmes in adult education in Austria exist to ensure quality in the field of education (Gruber & Lenz, 2016). The university locations in Graz, Styria (University of Graz, 2023) and Klagenfurt, Carinthia (University of Klagenfurt, 2023) are the main higher education institutions offering education and training programmes to adult educators in Austria. At these institutions, Master's degree programmes are offered for the special field of educational sciences.

Hungarian Programmes

The history of adult education in Hungary stretches back to the 1850s when adult education and training was institutionalised and integrated into the state educational policy (Felkai, 1986). During a long evolutionary process, adult education and training structures adapted to the ongoing economic, political, and social transformations of the country. Several governmental regimes were included in these changes that involved socialist rule, post-war democratisation of schooling, westernisation, and EU integration (Nemeth, 2014).

The formal training of adult educators at university level was first institutionalised in Hungary in the 1950s and1960s, which was followed by multiple transformations in understanding adult education as a profession and subsequent changes of degree names, curricula, and content until the 2000s (Beszédes & Farkas, 2023). The formalisation of adult education at the national level was carried out in 2001 with the adoption of the Adult Education Act (101/2001), which laid down the main structures for adult education and training (Laki, 2013), as well as education and training requirements for adult educators. This was followed by establishment of the first BA, MA and PhD programmes in adult education by the Hungarian universities. It was subsequently supported and specified by European Union regulations and policies (Council of the European Union, 2011, 2021).

---

[11] The establishment of KEBÖ also took place by that time. KEBÖ is the Conference of Austrian Adult Education and includes institutions that are considered the core of adult education. KEBÖ today consists of ten adult education associations (Gruber & Lenz, 2016). It is an independent umbrella organisation that fulfils the wish of many adult education associations to collaborate on overarching concerns.

[12] One essential criterion is the provision of a regular offer that is systematic and publicly communicated. Adult education must also form the core activity of the institution. It is equally relevant that the institution has already been offering and implementing adult education activities for more than three years. Finally, at least the manager or a full-time staff member must have sound pedagogical training and two years of professional experience in the field of adult education. These aspects show that the adult education landscape in Austria is characterised by a diversity of institutions. They are financed both under the supply and demand principle and from public coffers (Gruber & Lenz, 2016).

Canadian Programmes

In contrast to the above programmes, Canada's adult education derived predominantly from social purposes such as national cohesion, inclusive citizenship, and community building as consensus. These themes emerged on the federal level based on colonial settlers and an immigration-oriented nation significance (Nesbit, 2011). Canada's geographically far-flung and large territory, and differing historical and political contexts among major provinces, have been shaped during the nation-building process. These factors have affected adult education to develop differently from that of European countries mentioned above. Consequently, adult education policies and domains (programmes and learning opportunities) vary across provinces to meet the specific needs of the populations they serve within the territories (Selman et al., 1998). Because of this diffuse nature, as well as the deep-rooted social purpose tradition that emphasises democratic citizenship, academic professionalisation in the field of adult education has been rarely discussed in literature.

Canadian adult educators began actively promoting professionalisation of the field in the 1950s. This era was a pivotal decade for professional approach in adult education that came with four core directions: the emergence of a sense of vocation and professionalism; the development of training opportunities; institutional development; and the growth of a body of literature (Selman et al., 1998). Among these varied efforts, post-secondary universities across the country began to play a significant role in the structured, institutional development of adult education[13].

Discussion on Comparison of Master's Programmes

Considering these contextual and historical developments, we compared the three countries in terms of the general features of the three Master's programmes, along with the programme structures and specific curriculum/content.

In terms of general features, all three Master's programmes shared the concept of lifelong learning and education, and similarly put emphasis on the diverse settings of adult education (formal, non-formal, and informal), theory,

[13] Thirty-seven post-secondary educational institutions were providing adult education programmes across Canada at the time of writing(Canadian Adult Education Programs | CASAE | ACÉÉA, 2022). To become an adult educator, one usually needs to enrol in a post-secondary institution to acquire a certificate or a degree, which takes two to three years. Educators through post-secondary institutions are hired by government-funded colleges and institutes, private career training schools, companies, or community and government agencies.

and research-oriented practices. Master's programmes in Austria and Hungary have more similarities than differences, whereas the Canadian one substantially differs from them. This finding partly demonstrates the heterogeneity of adult education, particularly in practices and training programmes across countries and provinces. These differences are influenced by numerous factors such as historical origin, socio-cultural, economic, and demographic contexts, as well as national (and provincial) policies. More significantly, Hungary and Austria share the European framework of lifelong learning (Council of the European Union, 2011), which similarly informs national policies for adult education, including the development of training and education programmes for adult educators in the two countries – the focus is on vocational education, practice-based, rigorous educational programmes. In contrast, Canada demonstrates distinctive features in these aspects, and focuses on social-purpose, province-oriented, flexible educational programmes.

Examining the structure of Master's programmes, all three programmes had a similar time span to attain the degree: two years or four semesters. However, Master's programmes in Austria and Hungary showed a similar level of requirements compared to the Canadian programme. Noticeably, the post-secondary institutions in Austria and Hungary offer the degree of Master of Arts (MA) for adult education, whereas institutions in Canada offer a variety of degrees at the Master's level, including MA, Master of Education (MEd), and other certificates and diplomas for qualifications in the field of adult education. Another distinct difference was found in the workload between the European countries and Canada. While 120 ECTS are required in Austria and Hungary (equalling 24 courses on average), Canada required ten courses (30 credits) for the completion of the MEd degree. Also, the Canadian programme allowed for writing a graduating paper in lieu of a course (3 credit hours). This difference reflects a higher requirement level in the more rigid structure of European programmes, and the relatively flexible, learner-centred structure in the Canadian programme that may meet the needs of the adult learner more readily.

The University of Pecs had the strictest admission requirements and enrolled only students with a Bachelor of Arts (BA) degree in Education/Social Science/ Psychology, as well as a minimum B2 level of English proficiency according to CEFR[14]. In contrast, the University of Klagenfurt required a BA diploma in majors that were relevant to the programme. The greatest opportunities for diverse applicants were offered by the UBC, which welcomed students with a variety of backgrounds, including international students, seeing it as an advantage

[14] CEFR (Common European Framework of Reference for Languages) is an internationally recognised standard for describing language proficiency with 6 levels (A1, A2, B1, B2, C1, C2), from basic to proficient.

and an opportunity to adopt new perspectives and practices into the programme and university.

Lastly, the content and curriculum of each programme in the three countries demonstrated interesting aspects in both similarity and difference. All three programmes offered various electives to students, thus, recognising diverse domains and teaching areas, as well as diverse topics, subjects, and concerns in the field of adult education. Further inquiry, however, again showed significant similarity between Austria and Hungary compared to Canada. The Canadian programme emphasised a general sense of adult education, with a historical and philosophical focus based on theory and research. Students were required to enrol in three courses and one research method as mandatory, along with choice in electives. On the other hand, Master's programmes in Austria and Hungary seem to take a more practical approach than Canada, focusing on vocational education and a practicum. For example, the University of Klagenfurt Master's programme required 150 hours of mandatory internship, while students in the Hungarian programme needed to complete 160 hours of practicum. In the educational context, the Austrian programme consisted of three different streams, with focus not only on theory and research orientation, but on cooperation among different institutions as well. This focus provided an emphasis on management skills and legal issues for the students. At the University of Pecs in Hungary, the Master's programme was based on the social sciences perspective. As a relatively new adult education training programme, it highlights the active integration of the European Union framework as the programme draws on the European Education Area topics and concerns (European Union, 2023). The focus on students' engagement in international programmes and exchanges includes a specific module on EU policy-related courses in the programme.

Findings from Participants' Interviews on Professionalism

After comparing the Master's programmes of the three countries, the next section focuses on the participants' analyses of the work they have been performing in terms of their roles (pedagogical, management and other). Quotations are used to illustrate critical theoretical discussion. This section on the discussion of findings highlights the three participants' interviews and uses the logics of action (professionalism, market, bureaucratic) to analyse professionalism. We discuss the relevance of hybrid professionalism, the importance of educational work, and the tensions among the logics. The purpose is to critically reflect upon the logics of their work (see Table 2 for data on interviewees).

Hybrid Professionalism: The Importance of Educational Activities

Interviewee A addressed different logics of action in his work as adult educator during the interview[15]. When he started working in adult education – more than five years ago – he really wanted to gain his first experience at an adult education centre (VHS). He said he was prompted by the humanistic educational ideal that he associated with this particular adult education institution. During his work, however, he quickly identified tasks that were not solely pedagogical. In the interview, he spoke of the administrative work and management and explained:

> The main tasks in my area were acquiring project funds and implementing projects, plus doing the accounting. At the beginning, it wasn't so clear to me. There was really a lot of money involved (Interviewee A).

Operationally, he was required to undertake fewer pedagogical actions since his activities were more about making decisions at a low management level. Still Interviewee A mentioned the importance of specific knowledge concerning adult education. He said:

> The [higher education] studies give you a good foundation for this job. I had different academic colleagues, e.g. business economists, psychologists, etc. It was a very diverse mix. I noticed that I could give good professional reasons for every decision at a low management level. It was relatively easy for me to substantiate it with models and theories. A pedagogical view, a decidedly adult pedagogical view, is necessary. My colleagues don't have that. They have more of an administrative logic. They justify it by saying that they have been doing it this way for a long time, but they cannot argue why (Interviewee A).

He was no longer involved in pedagogical activities in his current position and had no contact with participants in adult educational events. Interviewee A's main tasks included management in terms of developing a strategic perspective for the institution he was working in, communication inside and outside the institution, and a representative role. He stated that these activities included

[15] Interviewee A explained that the professionalisation of Austrian adult education was the core mission of the institution he was working in The educational offerings of his organisation therefore addressed people who are active in adult education, i.e., course instructors, lecturers, or various actors at the micro and macro-didactic levels. He also noted focus on educational management. In response to questions about professionalisation measures for staff engaged in adult education, the interviewee said his activity belonged to the field of vocational adult education.

dealing with topics like financing, cooperation, the mission statement, and the external image of the institution.

Following a similar reasoning and analysis, Interviewee C referred to a variety of professional duties, daily routines at the workplace and complexity of goals, actions, and activities her job required. She noted:

> Besides instruction, I also have some kind of official meetings with my colleagues. Also, the people that work in a higher educational context must do some kind of research... we have the research groups meetings. When you belong to your institution, you have to prepare for those duties, and participate actively during these meetings. Besides that, I also have regular meetings related to the work of the department... So sometimes I have a feeling that adult educators who are involved in higher education institutions have to work more than 12 hours a day (Interviewee C).

Therefore, like other professionals in their current workplaces, she was regularly confronted with a diversity of activities requiring a variety of knowledge and competences. Interviewee C referred to her work as a multi-activity practice involving various roles, which sometimes became controversial, overwhelming, and hard to balance.

Most of the professional efforts Interviewee C reflected on were related to pedagogical practices. She noted that these professional endeavours were not limited to functions associated with her disciplinary affiliation; nor were they aimed at meeting the requirements of the institutional professional community she belonged to. On the contrary, in her professional life, she endeavoured to integrate a wider variety of action logics that were inherent in the need for a hybrid logic of professionalism within her institutional context, reconciling with the bureaucratic logic with respect to legal requirements and norms her work had to follow, and the market logic, when she discussed funding. However, the logic of professionalism being dominant in the Interviewee C's work outlines autonomy and ability to perform as an expert in her domain (Egetenmeyer et al., 2019). By describing her daily routines, Interviewee C underlined the importance of agency in the workplace setting and achieving the goals, as well as acknowledgement of her expertise and authority given to her on the institutional level. She explained:

> At the university, in my current work, you are the one that sets the goals... You might get the syllabus from a previous colleague, and you might gain some insight related to that. But actually, it's up to you. It's up to your creativity and your personal expectations regarding the course (Interviewee C).

Using this line of reasoning, Interviewee B also largely demonstrated that she regularly encountered different logics of actions, often at odds with one another, and had various demands based on shifting social and economic contexts in her workplace. The most significant logic of action observed in this interview was the logic of professionalism (Freidson, 2001). She repeatedly demonstrated a sense of autonomy and agency that comes with flexibility in planning and organising adult education programmes. She noted, "[We need] organisational skills... scheduling, efficiency, but the ability to adapt, be flexible when [an] instructor suddenly pulls out... We had to go beyond that. So, it was a challenge" (Interviewee B). The logic of professionalism seems to have been reinforced during COVID-19, when Interviewee B was faced with new requirements, such as following pandemic-related regulations and adapting to online courses and the relevant technologies. She tried to utilise and maximise the resources and knowledge that were achieved through her prior learning and working experiences across multiple domains in adult education. At the same time, she continued to pay attention to what learners might want to learn from the courses in the shifting context; "...planning the courses was trying to figure out what will people find interesting... [I cared about] demographic... that I have to look at where they're coming from, and how can we make this work for them and be respectful" (Interviewee B). It should be noted that this interviewee indicated that in multicultural settings (like Canada), adult educators were required to have intercultural and empathetic skills for learners of various cultural backgrounds. This shaped her solid belief that adult educators needed to thoroughly investigate learners' specific contexts and backgrounds in order to provide adult education.

It is evident that Interviewee B was equipped with a sense of autonomy in negotiating and responding to multiple, conflicting needs (of learners, budget, and administration) in highly self-responsible ways. Freidson (2001) emphasised that the sense of autonomy was a crucial condition for professionalism. Similarly, the discourse of Interviewee B when referring to professional activities also exhibited hybrid professionalism – a reflexive competence and control that connects work, organisational action, and social conditions within complex and shifting relations (Breitschwerdt, 2022; Noordegraaf, 2007). This flexible and critical notion about the role of adult educators and the sense of autonomy is well connected with the focus of adult education programmes at the higher education institutions where Interview B has been working, and where she had received her professional training as an adult educator[16].

[16] The observations and findings should, however, be interpreted with caution. As indicated in the interview, the extent of autonomy and professionalism that adult educators perceive in other domains with different activities might differ from that of Interviewee B, who had been mostly involved with community-based liberal arts programmes and with coordinating and organising tasks. It encourages further research of different domains in the adult education contexts, such as the Canadian one.

Tensions among Logics: The Relevance of the Market Logic

Review of the discourses found in the three interviews underscores the tensions between the logics for the participants. For example, Interviewee A claimed that his current job was at a higher management level, at which he was no longer involved in pedagogical activities with the learners. His focus was on endeavours such as finances and outward facing activities related to the mission and external image of the institution. All these tasks existed in a state of tension, according to Interviewee A. Although it was important for him to fulfil the pedagogical demand of providing adult education activities and events, financing (budgeting) had to be guaranteed for the organisation event to be held. For Interviewee A, it was important to reconcile and balance the areas of professionalism, market, and bureaucratic logics. But, as director of an adult education institution, his position and job responsibilities emphasised the importance that he largely satisfy management requirements and values for the organisation in contrast to pedagogical concerns.

Through his discussion, Interviewee A clearly followed the model of hybrid professionalism according to Noordegraaf (2007, 2015). References to the Federal Ministry of Education, Science and Research, as well as other statements in the interview highlighted the close interconnection between the micro, meso, and macro levels of adult education (Egetenmeyer et al., 2019), which suggests hybrid professionalism. In this context, Interviewee A spoke of a certain pragmatism that he developed over the years to balance the tensions between logics. He explained:

> Funding is often tied to conditions, all of which must be met. E.g., the examination activity in compulsory education. On a pedagogical level, it often doesn't make sense. But then you're standing there. The logics contradict each other. In the meantime, a pragmatism has developed in me, although I am of course an educator. There are no easy ways to balance the areas of tension. Basic pragmatism is my approach. [...] You have to accept the logic. Course leaders are less aware of such tensions. (Interviewee A)

In his explanations, Interviewee A also gave examples of how professionalism is a flexible concept and requires individual and situational action. He argued:

> The core of professional action is to recognise that there are no simple solutions and that actions are complex. Professionalism means not sticking to recipes [...] This is where adult education science is needed to bring insights into the field. (Interviewee A)

Therefore, Interviewee A stated that the market logic was always present in his actual work. He pointed out that

> The further up the career ladder I climb, the more important market logic becomes. Pedagogical idealism is no longer enough. (Interviewee A)

Thus, his work corresponded to actual professional practice, as according to Breitschwerdt et al. (2019), "Adult education activities are not only pedagogical in nature; professionals also have to deal with questions of funding, quality management and standardisation." (p. 89)

The market logic was also stressed by Interviewee B. For example, she expressed her conflicting feelings when she learned that an executive director in her workplace decided to increase online courses rather than face-to-face courses because of broad marketability and demand. Yet, many senior adult learners struggled to adapt to online courses and apparently preferred that the organisation organises in-person courses for them.

> So, for my boss, who was a director, who basically wanted to see numbers, and then at a higher level of executive director, was [also] looking at numbers. So, the numbers are better online than face-to-face. (Interviewee B)

Increasing competition among adult education institutions for profitability was reinforced during the pandemic era and emphasised by Interviewee B. Furthermore, as an adult educator, she seemed to care about senior adult learners as important populations in adult education. Her organisation's recent policy of increasing courses for young adults (credit-based) and cutting down community outreach programmes for seniors disappointed her. She stated, "I don't know what's gonna happen with the courses I was running… it's sad…It's not enough. They're not a high priority. They never were really high priority but became even more [meaning less relevant] with COVID" (Interviewee B). The impact of online or digitalisation in adult education increased the profit for the organisation in which Interviewee B was working. The market logic was emphasised and appeared to be a constraint to professionalism.

Normative Constraints in Adult Educators' Work: The Bureaucratic Logic

In parallel with other logics of action, Interviewee B demonstrated that she encountered multiple bureaucratic requirements in her daily practices. It was evident that at the institutional level, certain rules and expectations were imposed on adult educators in the organisation. For example, she had to follow guidelines for scheduling, the deadlines and was expected to collaborate with different teams and staff on projects (e.g., marketing, technical assistance and educational support). These activities seemed to be embedded in her institution as normalised practices. She, however, suggested that these rules and guidelines might vary depending on each working organisation:

> In Canada, we are not national... as a country, we were not unified in promoting education... It's provincial, it's very, it's very provincial, but then even there'll be different ways of doing things between the higher education institution and other departments... that was made at an executive director level for extended learning... it's getting down to quite a very minute level. (Interviewee B)

Interviewee B felt some flexibility in her work and related it to the fact that the programme she was working in was under Liberal Arts and Community Outreach, which included non-credit-based courses. She suggested, for example, that career education programmes (certificate-based) had a more rigid structure than the programmes she was involved in, resulting in less autonomy and more constraining requirements for other adult educators. Nevertheless, she believed that the ways adult education programmes were run in Canada largely depended on each province and institution, which was comparable to other countries she had personally experienced (e.g., Australia was noted). Thus, at the provincial level, a set of standardised categories are provided for adult education programmes in Canada, yet the definitions for the groupings allow for some flexibility and diverse applications by providers.

Interviewee C also reflected on the complex institutional structure of the university as a limitation of individual autonomy of professionals. She emphasised that this structural complexity was ultimately tied to the bureaucratic logic, which, in turn, comprises standardisation (Freidson, 2001). Interviewee C felt confined by the necessity of fulfilling duties she as a professional did not consider important, such as attending meetings discussing plans and goals with other colleagues, or compulsory collaboration on a research project she was not committed to. Perceiving herself primarily as a teacher, Interviewee C was reluctant to engage in activities which she qualifieddenoted as frustrating and a drain of energy. She was aware that these obligations were imposed by the academic hierarchy of the organisation she was working in, where she held a junior position. Thus, the bureaucratic logic limited her autonomy of decisions, depriving her of power to change her work.

Lastly, Interviewee A noted that there were also federal requirements in his work. He remarked that his organisation was directly subordinated to the Federal Ministry of Education, Science and Research and thus bound by instructions and regulations. Interviewee A observed that he founded it valuable to acquire the competences to recognise the individual areas of tension in his daily work, especially the bureaucratic logic, and be able to reconcile them with the other logics.

Conclusions

This article aspired to provide a discussion on academic professionalisation, namely at the Master's level, established in Austria, Canada, and Hungary, and to explore the logics of action understood by three adult educators within their daily working practices.

First, it should be noted that the extent of promoting professionalisation and professionalism of adult education differed in each country depending on its social and historical context. Canada highlighted an important thread of social justice content in the programme in comparison to Austria and Hungary. Additionally, the analysis of the Master's programmes showed that the professionalisation of adult educators has been evolving in all three countries due to the recognition that the higher education institutions in which they are delivered are increasingly and globally recognised as crucial stakeholders in the field of adult education (Egetenmeyer et al., 2019; Egetenmeyer & Käpplinger, 2011; Egetenmeyer & Schüßler, 2012).

In Austria and Hungary, Master's programmes were identified as having a relatively rigid structure, significant workload requirements, and focus on the practical aspect (e.g., credit hours in internships). It can thus be concluded that these programmes maintain a defined set of desired knowledge and competences for adult educators, indicating the extent of advancement of professionalisation in these European countries through academic institutions (Farkas, 2013; Gruber & Lenz, 2016). In contrast, the Canadian educational programmes, even with the broader institutionalisation of adult education in comparison with the European countries, tend to lay stress on more flexible knowledge and competences and the autonomy of adult educators (Nesbit, 2011; Selman et al., 1998). The focus on social purpose and universal cause of adult education for social change was observed in the Canadian programmes and demonstrates why professionalisation of adult education is a more controversial issue than in the two other countries (Nesbit, 2011).

Each of the three interviews showed an interweaving of the different logics when exploring and understanding the holistic, day-to-day practice of adult educators. For example, all the interviewees described the importance of specific knowledge and competences in adult education for the development and implementation of daily work activities. This leads to the conclusion that the content and curricula of academic programmes in adult education are essential for the professionalism of an adult educator (Egetenmeyer & Schüßler, 2012). Indeed, the analysis of the Master's programmes in Austria, Canada and Hungary confirms that professionalisation is taken seriously and is supported by academic pathways in all three countries. The concepts and theories in the field of adult education are central when it comes to justifying decisions and actions based on professional knowledge. This deduction is even more significant if we consider that interviewees A, B and C stressed that adult education was a complex field of work that followed different logics and placed high demands on professionals. All three interviewees fulfilled different tasks in their daily work as adult educators that required a prominent level of specific knowledge and competences, which substantiated professionalisation of the field.

Additionally, the practice of adult education was also described as a multi-activity work and involved several logics of action – the market logic, bureaucratic logic, and logic of professionalism. The activities required an understanding of the complexities and an ongoing balancing of the tensions among the logics. The interviewees' discussions emphasised that equivalence of the logics was difficult to maintain or achieve. Rather, hybridisation of the logics seemed particularly relevant to the work of adult education practitioners, given that, in some moments, one or two logics are more prominent. Two interviewees' main work was in the field of teaching, and the emphasis appeared to be on the logic of professionalism (Interviewees B and C). For Interviewee A, the director of an adult education institution, the market logic was the crucial point of reference for his actions at work. These accounts show how closely the logics of action are connected to the respective domain of adult education in terms of the actual job descriptions and work activities.

Finally, the interviews of adult educators were highly reflective in nature. While discussing and sharing thoughts about their work and activities, all three interviewees described details that illuminated the importance of professionalism in their work and the complexity of the specific fields of action when completing tasks or making decisions. Thus, the interviewees showed that the reflective competence as a professional is central to work in the field of adult education. Therefore, in further research, it will be critical to extensively examine the issues of how the work of an adult educator is developed, and to analyse the knowledge that is used in daily practice, along with the knowledge and competences required to achieve professional tasks.

Lastly, the possibilities and constraints of the work organisations' contexts and challenges imposed by globalisation need further investigation. Digitalisation and profit-seeking in the work organisations in adult education are increasingly important. These trends, illuminated after the pandemic, continue to challenge the professionalisation and professionalism of adult educators and warrant additional attention and study. As adult educators must consider the various demands and logics of action, these factors may contribute to hybrid professionalism in the field. Further studies may show to what extent tensions among logics may be found.

References

Anderson, R. (2007). *Thematic content analysis: Descriptive presentation of qualitative data*. http://rosemarieanderson.com/wp-content/uploads/2014/08/ThematicContentAnalysis.pdf

Beszédes, V., & Farkas, É. (2023). Past and present developments in the professionalisation of adult learning and education in Hungary. Andragoška spoznanja, 29. 87–105. https://doi.org/10.4312/as/13456.

Boeren, E. (2018). The methodological underdog: a review of quantitative research in the key adult education journals. *Adult Education Quarterly, 68*(1), 63–79. https://doi.org/10.1177/0741713617739347

Breitschwerdt, L. (2022). *Professionalitätsentwicklung in der Erwachsenenbildung & Weiterbildung als Mehrebenen-Phänomen. Eine qualitative Einzelfallanalyse am Beispiel einer Organisation der beruflichen Weiterbildung*. Springer.

Breitschwerdt, L., Lechner, R., & Egetenmeyer, R. (2019). The "new professionalism" in adult and continuing education – a multi-level perspective. *Adult Education and Development. The Good Adult Educator, 46*(86), 88–91. https://www.dvv-international.de/fileadmin/files/epaper/86_2019_en/index.html#0

Canadian Association for the Study of Adult Education (CASAE/ACÉÉA). (2022). *Canadian adult education programs.* https://www.casae-aceea.ca/canadian-adult-education-programs/

Canário, R. (1999). *Educação de adultos. Um campo, uma problemática*. Educa.

Council of the European Union. (2011). Council Resolution on a renewed European agenda for adult learning. Official Journal of the European Union, C 372, 1–6. https://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=OJ:C:2011:372:0001:0006:en:PDF

Council of the European Union. (2021). Council Resolution on a new European agenda for adult learning 2021– 2030. https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:32021G1214(01)&from=EN

Doyle, L., Egetenmeyer, R., Singai, S., & Devi, U. (2016). Professionalisation as development and as regulation: Adult education in Germany, the United Kingdom and India. *International Review of Education*, *62*, 317–341. https://doi.org/10.1007/s11159–016–9560-y

Egetenmeyer, R. (2016). What to compare? Comparative issues in adult education. In M. Slowey (Ed.), *Comparative adult education and learning. Authors and texts* (pp. 79–116). Firenze University Press. https://library.oapen.org/bitstream/handle/20.500.12657/55305/1/9788864534220.pdf#page=90

Egetenmeyer, R., Breitschwerdt, L., & Lechner, R. (2019). From 'traditional professions' to 'new professionalism': A multi-level perspective for analysing professionalisation in adult and continuing education. *Journal of Adult and Continuing Education, 25*(1), 7–24. https://doi.org/10.1177/1477971418814009

Egetenmeyer, R., & Käpplinger, B. (2011). Professionalisation and quality management: Struggles, boundaries, and bridges between two approaches. *European Journal for Research on the Education and Learning of Adults, 2*(1), 21–35. https://doi.org/10.3384/rela.2000–7426.rela0058

Egetenmeyer, R., & Schüssler, I. (Hg.). (2012). *Akademische Professionalisierung in der Erwachsenenbildung/Weiterbildung*. Schneider Verlag Hohengehren.

European Union. (2023). *European Education Area*. https://education.ec.europa.eu/

Evetts, J. (2011). A new professionalism? Challenges and opportunities. *Current Sociology, 59*(4), 406–422. https://doi.org/10.1177/0011392111402585

Farkas, É. (2013). *The practice of adult education and vocational training in Hungary.* SZTE JGYPK.

Fejes, A., & Nylander, E. (2015). How pluralistic is the research field on adult education? Dominating bibliometrical trends, 2005–2012. *European Journal for Research on the Education and Learning of Adults, 6*(2), 103–123. https://doi.org/10.3384/rela.2000–7426.rela9063

Felkai, L. (1986). The beginnings of adult education in Hungary from 1848 to 1919. *Andragogy, 4*, 41–53.

Freidson, E. (2001). *Professionalism, the third logic: On the practice of knowledge.* University of Chicago Press.

Gibson, C., Holme, R., & Taylor, N. (2017). Professionalisation in adult education. In H. Fehring & S. Rodrigues (Eds.), *Teaching, coaching and mentoring adult learners: Lessons for professionalisation and partnership* (pp. 45–59). Routledge.

Gieseke, W. (2018). Professionalisierung der Erwachsenenbildung/Weiterbildung: Historische Prozesse und strukturelle Herausforderung der Gegenwart. In R. Dobischat, A. Elias, & A. Rosendahl (Hg.), *Das Personal in der Weiterbildung: Im Spannungsfeld von Professionsanspruch und Beschäftigungsrealität* (pp. 57–77). Springer VS.

Gruber, E., & Lenz, W. (2016). *Portrait adult and continuing education Austria*. W. Bertelsmann.

Harvey-Jordan, S., & Long, S. (2001). The process and pitfalls of semi-structured interviews. *Community Practitioner, 74*(6), 219–221. https://www.proquest.com/docview/213313284

Jütte, W., Nicoll, K., & Salling Olesen, H. (2011). Professionalisation: The struggle within. *European Journal for Research on the Education and Learning of Adults, 2*(1), 7–20. https://doi.org/10.3384/rela.2000–7426.relae2

Krippendorf, K. (2019). *Content analysis: An introduction to its methodology*. Sage.

Laki, I. (2013). The institutional framework of the Hungarian adult education system. *Culture and Community, 4*(3), 31–36. https://epa.oszk.hu/02900/02936/00014/pdf/

Lattke, S., & Jütte, W. (Eds.). (2015). *Professionalisation of adult educators: International and comparative perspectives*. Peter Lang Edition.

Lichtman, M. (2023). *Qualitative research in education: A users' guide*. Routledge.

Lima, L. C., & Guimarães, P. (2011). *European strategies in lifelong learning: A critical introduction.* Barbara Budrich Publishers.

Milana, M., & Skrypnyk, O. (2009). *Professionals vs. role professionals: Conceptualising professionalism among teachers of adults. Pathways towards Professionalisation*. German Institute for Adult Education.

Nemeth, B. (2014). The growth and decline of research on the history of adult education in contemporary Hungary: Trends and issues of historical research from 1993 to 2013. *Eötvös Loránd University Nevelestudomany 2014*(1), 40–54. http://nevelestudomany.elte.hu/downloads/2014/nevelestudomany_2014_1_40–54.pdf

Nesbit, T. (2011). Canadian adult education: Still a movement. *Canadian Journal of University Continuing Education, 37*(1), 1–13. https://doi.org/10.21225/D52S3S

Nittel, D. (2000). *Von der Mission zur Profession? Stand und Perspektiven der Verberuflichung in der Erwachsenenbildung*. Bertelsmann Verlag.

Noordegraaf, M. (2007). From "pure" to "hybrid" professionalism: Present-day professionalism in ambiguous public domains. *Administration & Society, 39*(6), 761–785. https://doi.org/10.1177/0095399707304434

Noordegraaf, M. (2015). Hybrid professionalism and beyond: (New) Forms of public professionalism in changing organizational and societal contexts. *Journal of Professions and Organization, 2*(2), 187–206. https://doi.org/10.1093/jpo/jov002

Nutt Williams, E., & Hill, C. E. (2012). Establishing Trustworthiness in Consensual Qualitative Research Studies. In C. E. Hill (Ed.), *Consensual pualitative research: A practical resource for investigating social science phenomena* (pp. 133–139). American Psychological Association.

Selman, G. R., Dampier, P., Cooke, M., & Selman, M. (Eds.). (1998). *The foundations of adult education in Canada*. Thompson Educational Publishing.

Sennett, R. (2008). *The craftsman.* Yale University Press.

Tietgens, H. (1988). Professionalität in der Erwachsenenbildung. In W. Gieseke (Ed.), *Professionalität und Professionalisierung* (pp. 28–75). Klinkhardt.

UNESCO Institute for Lifelong Learning, Institute for International Cooperation of the German Adult Education Association, German Institute for Adult Education. Leibniz Centre for Lifelong Learning, International Council for Adult Education. (2021). *Curriculum globALE: Competency framework for adult educators*. https://unesdoc.unesco.org/ark:/48223/pf0000377422

University of British Columbia. (2023). *Adult Learning and Education (ALE).* Department of Educational Studies (EDST). https://edst.educ.ubc.ca/programs/adult-learning-and-education/

University of Graz. (2023). *Adult and continuing education Master's degree.* https://www.uni-graz.at/de/studium/masterstudien/erwachsenen-und-weiterbildung/

University of Klagenfurt. (2020). *Curriculum for adult learning and education and vocational education and training.* https://www.aau.at/wp-content/uploads/2020/05/Mitteilungsblatt-2019–2020–20-Beilage-11.pdf

University of Klagenfurt. (2023). *Master adult learning education and vocational education.* https://www.aau.at/studien/master-erwachsenenbildung/#toggle-id-1

University of Pecs. (2020). *MA in Adult Education (Andragogy*). https://international.pte.hu/study-programs/ma-adult-education-andragogy

Williams, E. N., & Morrow, S. L. (2009). Achieving trustworthiness in qualitative research: A pan-paradigmatic perspective. *Psychotherapy Research*, *19*, 576–582. https://doi.org/10.1080/10503300802702113

Zarifis, G., & Papadimitriou, A. (2015). What does it take to develop professional adult educators in Europe? Some proposed framework guidelines. *Andragoške Studije*, *2*, 9–22.

Elena Klimkina[17]
Univerzitet Eötvös Loránd-a (ELTE), Mađarska

Sarah-Maria Rotschnig[18]
Univerzitet u Klagenfurtu, Austrija

Jiin Yoo[19]
Univerzitet u Britanskoj Kolumbiji, Kanada

Lisa Breitschwerdt[20]
Univerzitet Julius-Maximilians u Vircburgu, Nemačka

Leslie Cordie[21]
Univerzitet u Oburnu, Alabama, SAD

Paula Guimarães[22]
Univerzitetu u Lisabonu, Portugalija

Akademska profesionalizacija i hibridni profesionalizam u obrazovanju odraslih[23]

Apstrakt: Diskurs o profesionalizaciji i profesionalizmu dugo se nalazi u fokusu prakse i istraživanja obrazovanja odraslih. U ovom kvalitativnom istraživanju, koje se oslonilo na teorijski okvir Freidsona (2001) i Noordegraafa (2007, 2015), primenjen je eksploratorni metod kombinovan sa dubinskom analizom (Nutt Williams & Hill, 2012; Williams & Morrow, 2009). Istraživanje je bilo usredsređeno na programe obrazovanja odraslih na nivou master studija u trima zemljama (analiza dokumenata) i na kritičko promišljanje logika akcija troje edukatora koji se bave obrazovanjem odraslih u tim zemljama, a koje su oni sami koristili u opisu svog rada (u polustrukturiranim intervjuima). Sprovedena je tematska analiza sadržaja kako bi se ispitali podaci o akademskoj profesionalizaciji i profesionalizmu u obrazovanju odraslih. Nalazi su pokazali da se stepen u kojoj se profesionalizacija promoviše razlikuje u sve tri zemlje, zavisno od društvenog i istorijskog konteksta i uzajamnog uticaja nekoliko faktora na obrazovne institucije koje nude programe

[17] Elena Klimkina je doktorantkinja Univerziteta Eötvös Loránd-a (ELTE) u Mađarskoj (eklimina@student.elte.hu).

[18] Sarah-Maria Rotschnig je doktorantkinja Univerziteta u Klagenfurtu u Austriji (sarah-maria.rotschnig@aau.at).

[19] Jiin Yoo je doktorantkinja Univerziteta u Britanskoj Kolumbiji, Kanada (jiinyoo@student.ubc.ca).

[20] Dr Lisa Breitschwerdt je istraživačica na Univerzitetu Julius-Maximilians u Vircburgu u Nemačkoj (lisa.breitschwerdt@uni-wuerzburg.de).

[21] Dr Leslie Cordie je docentkinja na Univerzitetu u Oburnu, u državi Alabami, SAD (lesliecordie@auburn.edu).

[22] Dr Paula Guimarães je vanredna profesorka na Univerzitetu u Lisabonu u Portugaliji (pguimarães@ie.ulisboa.pt).

[23] Elena Klimkina, Sarah-Maria Rotschnig i Jiin Yoo: metodološko sprovođenje (sprovođenje intervjua) i analiza podataka, pisanje članka s fokusom na rezultate i zaključak; Lisa Breitschwerdt i Paula Guimarães: konceptualizacija članka, pisanje članka s fokusom na teorijski i metodološki okvir, davanje povratnih informacija tokom procesa analize podataka; Leslie Cordie: davanje povratnih informacija tokom pisanja članka, konačno uređivanje i formatiranje članka.

obrazovanja odraslih. Osim toga, praksa edukatora koji se bave obrazovanjem odraslih a koju su oni sami opisali sadrži nekoliko logika akcija. U ovoj studiji se ističe postojanje hibridnog profesionalizma u obrazovanju odraslih.[24]

Ključne reči: obrazovanje odraslih, akademska profesionalizacija, hibridni profesionalizam, logike akcija, poređenje

[24] Zahvaljujemo se svim učesnicima u komparativnoj grupi „Aktivnosti, kompetencije i hibridni profesionalizam u obrazovanju odraslih“ na skupu pod nazivom „Akademija o obrazovanju odraslih – međunarodne i komparativne studije o obrazovanju odraslih i celoživotnom učenju“, koji je u februaru 2023. godine održan na Univerzitetu Julius Maximilians u Vircburgu. Rad i diskusije u okviru ove grupe i njenih međunarodnih članova predstavljali su polaznu tačku za ovaj članak i obogatili su perspektive autora.
Ovaj rad su podržali ERASMUS+ Blended Intensive Program (BIP), Grant No. 2022-1-DE01-KA131-HED-000057161-1, i Human Dinamics Center (HDC) Fakulteta humanističkih nauka Univerziteta Julius-Maximilians u Vircburgu.

Andragoške studije, issn 0354–5415, broj 11, decembar 2023, str. 39–63

Originalni naučni rad
UDK 378(430)(540)-053.85-055.2
doi: 10.5937/AndStud2302039G

Ana Guimarães Duarte[1]
University of Lisbon, Portugal

Lotta Buron[2]
University of Duisburg-Essen, Germany

Natália Alves[3]
University of Lisbon, Portugal

Sarah Schmidt[4]
Julius-Maximilians-Universität Würzburg, Germany

Siddhant Singh[5]
University of Delhi, India

Vanessa Beu[6]
Julius-Maximilians-Universität Würzburg, Germany

Non-Traditional Students: German and Indian Mature Women in Higher Education[7]

Abstract: Over the past decades, the number of non-traditional students attending higher education has grown worldwide. Governments and institutions encourage underrepresented students to enrol, often with two main goals: to boost national economic competitiveness and to enhance social inclusion in higher education for traditionally excluded groups, like older students. There is neither a policy nor academic consensus on what constitutes a mature student (O'Shea & Stone, 2011). In this study, we define mature women students as being 21 years or older when starting a bachelor's degree. The analysis of seven interviews conducted in Germany and India compares their sociodemographic profiles, their motivation for university study, the barriers they had to overcome, and the mechanisms of support they could count on, following the comparative method developed by Egetenmeyer (2012). The results show how structural conditions can facilitate or hinder mature women's access to and persistence in higher education.

Keywords: higher education, mature women, Germany, India.

---

1 Ana Guimarães Duarte is a PhD student and a Research Fellow at the University of Lisbon, Portugal (anaguimaraesduarte@outlook.com).

2 Lotta Buron is a master's student at the University of Duisburg-Essen, Germany (lotta.buron@stud.uni-due.de).

3 Natália Alves is an Associate Professor and researcher at the University of Lisbon, Portugal (nalves@ie.ulisboa.pt).

4 Sarah Schmidt is a master's student at the Julius-Maximilians-Universität Würzburg, Germany (sarah.schmidt08@aol.com).

5 Siddhant Singh is a PhD student at the University of Delhi, India (ssingh.mphil@ace.du.ac.in).

6 Vanessa Beu is a PhD student and Research Fellow at the Julius-Maximilians-Universität Würzburg, Germany (vanessa.beu@uni-wuerzburg.de).

7 This work was supported by the ERASMUS+ Blended Intensive Programme (BIP), Grant No. 2022-1-DE01-KA131-HED-000057161-1 and the Human Dynamics Centre (HDC) of the Faculty of Human Sciences of the Julius-Maximilians-Universität Würzburg.

Introduction

Globalization has affected economies worldwide, pushing for innovation and production advancements in all markets and industries. The “Knowledge Society”, as defined by Manuel Castells in the 1990s, has been forging continuous educational policies aiming to increase VET and higher education investment. The job market is pressured for a lifelong learner workforce perspective aiming to support organizations’ competitiveness. In the age of market competition, including the creation of economic blocs like EU, BRICS, and Mercosur, all workers are expected to develop new skills and participate in adult education activities to be successfully included as an “economically productive asset”. This “Lifelong Learning Turn” increased adults’ participation at every education level, including most ages and all genders.

Following this scenario, women were called upon to join the workforce as job markets expanded, but this call kept them in a secondary position, working in less paid, gendered jobs. Although this movement led them to gendered education pathways, women’s educational attainment undeniably increased substantially, especially in tertiary education. Between 1995 and 2018, female enrolment in higher education (HE) tripled globally, with women becoming overrepresented in 74 per cent of the countries from most regions, surpassing male enrolment in the same period (UNESCO, 2021).

Despite this increase in women’s HE enrolment, older women and working women remain underrepresented in the so-called group of non-traditional students. The student profiles included in this blurred category of non-traditional students vary depending on the institutional context and even global regions. What disabled, low-income, first-generation, ethnic minorities and mature students have in common is that they are part of “social groups that remain under-represented groups in HE in each national context” (Finnegan et al., 2014), and their trajectories in HE are affected by diverse intersectional factors (Finnegan et al., 2014).

Historically, adult education research has neglected intersectionality perspectives (Merrill & Fejes, 2018) but has more recently looked at the intersectionality of gender and age and other inequalities that have influenced women’s experiences in adult education in general and in HE in particular (Finnegan et al., 2014).

In the German context, the term non-traditional student has no uniform definition. It usually describes students who entered HE via second or third educational pathways, meaning those who gained university entry qualifications through routes other than the conventional learning trajectory (*Gymnasium* and obtaining the *Abitur*), as explained in Freitag (2012). Another perspective on this non-traditional group of students in the German discourse involves higher social or institutional barriers, for example, due to family conditions or difficulties in the educational system (Teichler & Wolter, 2004). In the Indian context, no specific term is associated with non-traditional students in HE; nor does the concept feature as a category in educational policies.

Another problematic and important concept for this study is the category of mature students. Neither of the two countries offer a clear age mark to determine who is considered a mature student; the same is true of international institutions connected to the education field. To ensure comparability within this research group, we use the following definition of mature students in HE: "students [enrolled for the first time] admitted to undergraduate courses aged 21 or over and not immediately following full-time secondary studies" (O'Shea & Stone, 2011, p. 275).

This study aims to explore the experiences of a non-traditional group of mature women students in German and Indian HE institutions, applying a methodological design based on a biographical approach leading to an international comparative analysis (Egetenmeyer, 2012), based on Cross's (1984) typology of barriers, Clayton and Smith's (1987) motivational typology of re-entry women, and Colvin's (2013) proposal of mechanisms of support.

The main research question is: "What are the motivations, personal and structural barriers, and support mechanisms mature women perceived and experienced when attending HE in German and Indian institutions?"

This chapter is structured into four sections. The first briefly presents Cross's (1984) typology of barriers, Clayton and Smith's (1987) motivational typology of re-entry women, and some supporting mechanisms the students identified. The second section provides an overall explanation of the methodological options, the third shows the country-specific empirical data, and the last section presents the comparative analysis of the two countries.

Mature Women in HE: Motivation, Barriers, and Support

Despite the profusion of European studies in different fields, such as education, psychology, sociology and management focusing on the experiences of non-traditional students in higher education, the experiences of mature women students remain the least explored among the non-traditional group, according to Mallia (2010). However, researchers, such as Merrill (2021), Merrill and Fejes (2018), Merrill and Revers (2023), are among the academics who have been studying the gendered experiences of non-traditional students in HE in Europe and this new feminized face in HE participation.

Specifically, in Germany, it was possible to find a relevant number of studies dedicated to exploring non-traditional students' experiences in HE (Teichler & Wolter, 2004; Tieben, 2020; Wolter, 2013), but few that were devoted to mature women's experiences in German tertiary education (Guimarães Duarte et al., 2023).

In India, non-traditional students in general and mature women in particular are neither a policy nor a research category. However, the last decade was a productive one in researching women's profiles, roles, experiences and enrolments in Indian HE, as evident in Khanan (2023), Patel (2023), Singh and Kumar (2023), Varghese and Sabharwal (2023).

To overcome the restrictions for this study in terms of comparative analysis, it was crucial to define analytical categories that could support the substantial cultural differences between Germany and India, their gendered societal issues, and their educational cultures. For this purpose, the motivational typology by Clayton and Smith (1987) seemed to be a feasible choice, as the eight motives for university study identified in their research with undergraduate re-entry women could encompass these cultural differences (Figure 1). The motives are vocational, self-actualization, knowledge, family, self-improvement, humanitarian, social, and role.

As varied structural and institutional limitations were identified in the literature review on mature women's experiences in HE, another analytical framework was selected to complement the motivational typology and to cope with the barriers and constraints faced by older women pursuing tertiary education. The typology of restrictions for accessing education identified by Cross (1984, p. 99) proposes three different types of barriers: situational (related to structural factors), institutional (related to educational organizations), and dispositional (related to individual attitudes and motivations).

Another category of analysis identified from the literature review is mechanisms of support, which women often report having or expecting to have, to incentivize and aid them to start, maintain and complete their HE studies. According to Colvin (2013), there are two types of support women can count on: a) personal/private mechanisms – related to family, friends, and peers; and 2) institutional mechanisms – linked to the policies, programs, and initiatives run by HE institutions to improve mature women students' experiences in their education pathways.

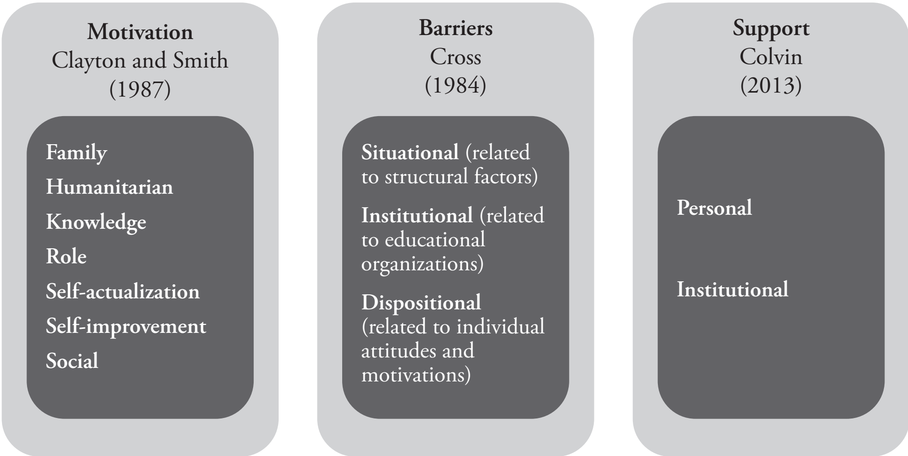


Figure 1. Categories and subcategories of analysis

Methodology

What types of motivation, personal and structural barriers, and support mechanisms are perceived and experienced by mature women when attending HE in German and Indian institutions? That is the research question we aim to answer in this study.

Methodologically, our research aligns itself with a constructivist and hermeneutic perspective. Assuming that women's educational experiences are unique, personalized, and framed by personal characteristics, cultural background, social structures, and gender-contextualized issues, a biographical approach combined with semi-structured interviews as a data collection method was the adequate option to give voice to these women and to know their realities.

The interviews were carried out with mature women students enrolled in an undergraduate course for the first time. The empirical corpus comprised three interviewees in Germany and three in India. The students were selected through convenience sampling (Guerra, 2006). All the participants were between the ages of 26 and 56 and were married or in a relationship. They were all mothers, some with young children.

All ethical considerations, including the confidentiality and anonymity procedures, were shared with the interviewees, who gave their consent. The interviews were 30 minutes long on average and audiotaped, transcribed, categorized, and analyzed using a content analysis method (Bardin, 1988), first regarding the content of each country and second, through a comparative analysis between countries based on Egetenmeyer's proposal (2012).

The three categories supporting the content analysis relied upon a) motivations, b) barriers (broken down into situational, institutional, and dispositional) and c) support mechanisms (personal and institutional).

The comparative analysis was structured on Egetenmeyer's proposal (2012) and followed four phases: 1) descriptive juxtaposition, 2) analytical juxtaposition, 3) descriptive comparison, and 4) analytical comparison, based on the interpretation of the similarities and differences between the findings of the two countries on the meso level (institutional) and micro level (individual), as described in Figure 2.

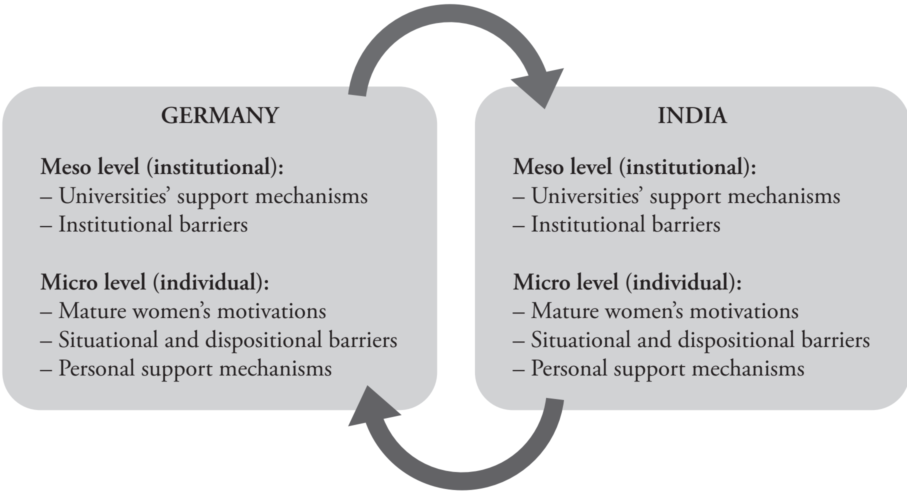


Figure 2. Analytical approach, categories, and levels of analysis

Mature Women in Higher Education in Germany

Higher education system

German pupils attend primary school from age six to ten. After primary school, lower secondary education is divided into three paths: *Hauptschule*, *Realschule*, and *Gymnasium*. In addition, there are mixed forms of these schools and separate schools for children with special needs. In upper secondary education, completed by pupils aged 17 to 19, the school-leaving certificate (Abitur) is also the university entrance qualification. The Abitur is the highest school-leaving certificate in Germany.

Graduates of other types of schools completed after lower secondary education are eligible to enrol in dual vocational training programs. Dual vocational training programs combine school-based vocational education and company-based vocational training. If the Abitur is used to access general higher education, the final grade determines entrance to specific acclaimed courses through the numerus clausus. It is also possible to earn the Abitur via second route education in evening schools or educational institutes and thus acquire a higher education entrance qualification. In addition, an examination up to the level of master craftsman can be completed after dual vocational training, which also provides access to higher education under certain conditions. However, this can be linked to the conditions of a subject-related and open-enrolment course of study. Therefore, students without an Abitur or a comparable qualification face barriers even with a master craftsman's certificate. Students on this path are considered non-traditional students in the relevant German literature (Wolter, 2022, p. 32). The roots of this definition lie in the development of the German education system. In this context, academic education was reserved for the upper social class, who attended the Gymnasium (Wolter, 2022, p. 28).

The early tracking in the German school system sets up students early for their later path, with the classical educational path after the Gymnasium including an academic career (Wolter, 2022, p. 27). Because of the lifelong learning discourse, the German Federal Ministry of Education and Research has aimed to open university entrance to people without this certificate through two strategies (see e.g. Autor:innengruppe Bildungsberichtserstattung, 2020). First, people with vocational competencies should have the opportunity to have their qualifications credited towards a degree. Second, people with vocational qualifications should have easier access to higher education. In this context, the Autor:innengruppe Bildungsberichtserstattung (2020, p. 193) data show that students with only vocational qualifications continue to account for only 4 per cent of the HE student body.

Studying in Germany costs little in relation to GDP. The GDP in 2022 was $48,636.03 per capita (Statista Research Department [Statista], 2023). The student services fee stands at €120–350 per semester, depending on location and university, and is distinct from tuition fees. Public universities do not charge tuition generally. The semester fees often cover, for example, public transportation passes. Unlike public universities, private institutions do charge tuition fees, usually in the low to mid five-digit range for the entire course of study. Tuition fees at private universities can range from €3,000 to €9,000 per semester (Ruthven-Murray, 2012, p. 73).

Enrolment statistics

Germany's higher education landscape consists of approximately 385 public HE institutions and 113 private HE institutions (Autor:innengruppe Bildungsberichtserstattung, 2020, p. 194). In the 2021/2022 winter semester, 871,764 male students and 777,613 female students were enrolled in bachelor's programs (Statistisches Bundesamt [Destatis], n.d.). It is impossible to determine how many of the women enrolled in bachelor's programs are over 21 years old. However, data are available on the average age of female first-year students – it stood at 23.5 years in the winter semester 2021/2022 (Destatis, 2022). Data on students over 21 are only available without information on gender and degree sought. Accordingly, there are no precise data on the number of women over 21 in bachelor's programs at German HE institutions.

For Germany, data are also available on the gender distribution across fields of study at the bachelor's level, but those figures are not broken down by age groups. They show (Table 1) that male enrolment is substantially lower than female enrolment in the following fields: education, arts and humanities, social sciences, journalism and information, and health and social services. The numbers are nearly even in business, administration and law, natural sciences, mathematics and statistics, and service. Fields, such as information and communication technologies, engineering, manufacturing and construction, agriculture, forestry, fisheries and veterinary medicine, enrol only half to a quarter as many women as men. These data reveal the profound genderization of academic choices and, consequently, of future career paths.

Table 1. Enrolment by sex and field of study in Germany, winter semester 2022/23

Field of Study	Total	Women	Men
Pedagogy	165 913	131 581	34 332
Arts and humanities	177 928	111 900	66 028
Social sciences, journalism and information	168 163	104 488	63 675
Business, administration and law	499 321	257 708	241 613
Natural sciences, mathematics, and statistics	155 957	71 465	84 492
Information and communication technologies	179 959	38 720	141 239
Engineering, manufacturing and construction	459 617	96 918	362 699
Agriculture, forestry, fishing, and veterinary medicine	25 653	9 006	16 587
Health and social services	111 303	85 463	25 840
Services	58 526	27 727	30 799

Source: (Destatis, 2022)

Mature women's motivations, barriers, and mechanisms of support

Julia, Anne, and Danielle are mature working women, who have decided to embark on an academic path in HE to improve themselves and their professional careers.

Julia realized she wanted to train apprentices while working as a hairdresser. "*Training others has always been the most fun for me. I have trained a total of four apprentices*" (Julia). Furthermore, early in her professional career, she realized that her job as a hair and make-up artist was low-paid and physically demanding, and she decided to look for other vocational options and attend university. A bachelor degree in education was her option.

Anne is a nurse, but she has worked as an educator in vocational training for the nursing professions, at a pediatric nursing school. Recently, she felt she needed "*brain food, [...]. So, to have to use my mind again, to have to make an effort*" (Anne), to learn something new. She wanted to make personal changes, to improve herself, as well as her career path. She decided to develop her teaching skills and knowledge by enrolling in a bachelor of education course.

Danielle felt constrained and unappreciated in her occupation as a nurse. She felt the need to obtain a university degree to make progress in her career that would allow her to show her abilities and skills and receive the acknowledgement she deserves: "*Also, later in my professional life, I always had a certain limitation in terms of responsibility and knowledge appreciation. It actually became a bit depressing*" (Danielle). Remaining faithful to her initial field of education, she is now enrolled in medical studies.

Julia, Anne, and Danielle are mainly driven by the desire to make personal changes and increase their professional career opportunities. According to Clayton and Smith's (1987, p. 93) typology, these mature women are motivated by self-improvement and vocational development. Of the three women, Danielle reveals the greatest dissatisfaction with her professional situation; her vocational motivation is more intensely expressed in her desire to change professions.

Danielle and Julia experienced institutional barriers (Colvin, 2013, p. 25). Julia had to cope with a "lack of access to information" (Colvin, 2013, p. 25). It was difficult for her to get access to information because of the remoteness of the university (around 100 km away from her home). Julia and Danielle both experienced "entrance [...] requirements" (Colvin, 2013, p. 25) as a barrier. Entrance requirements are interpreted as a barrier for Julia because, according to the German definition, she is considered a non-traditional student without an Abitur and therefore had to be admitted as one of the 4 per cent of non-traditional students in the applicant pool. Moreover, her choice of subjects was limited because, as a student without an Abitur, she was only allowed to pick courses without a numerus clausus. Danielle's entrance requirements involved taking the entry exam (TMS) for admission to her study course, in addition to evidence of prior vocational training and occupation in the field. At this point, she only had one shot at passing the exam and beginning her studies: "*Nothing will be as bad as the TMS, because I simply don't have this competitive pressure anymore – I don't have to be better than others, that's what's so incredibly mean, that you really must be better than them. We always say it a bit jokingly, but it's like 'the TMS trauma runs deep'*" (Danielle). A large amount of Danielle's time is taken by doctor's appointments because of her visual disability and childcare responsibilities, which are often incompatible with her study schedule, even though she has been admitted to special seminar groups for parents. Parents are supposedly to be supported by being offered courses at times when children are typically in school or day care. This, however, is often not the case, wherefore some of the university courses are inaccessible to her: "*The most difficult thing for me in medical school is not the amount of learning material, because I can handle that. It's actually the organization of appointments, which is awfully difficult*" (Danielle). Like Danielle, Julia also experiences "scheduling issues" (Colvin, 2013, p. 25). She has difficulty attending university events at different times of the day because of her long commute and motherhood responsibilities: "*Sometimes I wish I had more flexibility. Sometimes you have a seminar in the morning and then again very late in the evening*" (Julia). This is especially annoying when she has long breaks between events and cannot go home because of the long commute. Anne did not list any institutional barriers.

All the women reported multiple situational barriers. Danielle and Julia both experience their "financial situation" as a problem. Especially Julia, who is dependent on federal financial aid (Bundesausbildungsförderungsgesetz – BAföG). However, the law requires recipients to finish within the standard period of study, which for a bachelor's degree is six semesters: "*Do I get BAföG, how much BAföG do I get*?" (Julia). A conflict emerges for Julia between being eligible for state support by completing the study course in due time and investing time into the care of her child. Julia's and Danielle's pregnancies and maternities can be categorised under "health" (Colvin, 2013, p. 22). Danielle's chronic illness also relates to the category of health. Moreover, Julia and Danielle both experience "home responsibilities" and "childcare" (Colvin, 2013, p. 22) as situational barriers at university. Julia also describes a role conflict, "*Of course I'm also a mum. [...] And I am also an employee. You wonder if you can manage it all*" (Julia). Anne reported that she did not face any barriers while entering higher education. All three women face problems in terms of commuting to university. Therefore, "commute" should be considered a new subcategory related to the situational barriers that mature women experience.

All the women we interviewed experienced doubts before or while entering higher education. According to Colvin (2013, p. 23), feeling too old is a common concern for mature women. For Anne and Julia, this problem referred mostly to not feeling like a young and traditional student. Anne assumed her age might be a problem, but she "*enrolled there, like any other person, and age was never really an issue*" (Anne). Nevertheless, they stated that their age and experience also gave them an advantage over the traditional younger students, as they embarked on their studies in a more structured and focused way due to their previous training and life experience. Anne's doubts turned out to be unjustified as other students and professors treated her like any other student. Julia, on the other hand, experienced rejection because she was at university without an Abitur. She felt she was not being taken seriously by lecturers and that she was even actively discriminated against. The problem does not relate to ageist attitudes; rather, it should be considered a new subcategory related to dispositional barriers. The feeling of not being taken seriously is also an issue Danielle has experienced. She recognizes an "*area-wide discrimination against females or who are perceived as females*" (Danielle). All three women also experienced "fear of failure" (Colvin, 2013, p. 23). Julia and Anne had not studied intensively for a long time, which made them feel a bit uncomfortable in the beginning: "*I've got a bit of a problem with reproducing knowledge – maybe it is also because I've been in practice for so long and simply out of the classroom, that might also be the reason*" (Anne). In the beginning, they were overwhelmed with the quantity of content, but all of them found a way to cope with it.

The interviewees identified discrepancies between institutional support services their university claims to provide and the services that are actually delivered. Julia, for example, explained that while her university does offer parent-child rooms, these rooms are always locked and can only be opened on request by very few people who have the keys. To breastfeed one's child during seminars is possible but not welcomed, so it is the easiest to do this in the cafeterias, for example: "*it was very difficult for you to get to seminars. [...] you already feel that this is not wanted.*" (Julia). The possibility to complete assignments remotely as an alternative to seminars exists in theory but is not facilitated by all lecturers. This can lead to BAföG funding problems if the standard study period cannot be met. Danielle reports similar issues. For example, her university offers parents special seminar schedules or emergency childcare facilities, but they are not operated the way they should be. While Julia benefits from WhatsApp groups for parents of all study courses, Danielle found the theoretical lecture for pregnant or breastfeeding women in lieu of practical anatomy lessons involving dangerous chemicals very helpful. Anne consulted an academic advisor for her study course before enrolling at the university. The advisor answered all her questions and encouraged her to pursue a university degree despite her age, which Anne perceived as a very important push in the direction of finally enrolling in the course. It can therefore be said that institutional support mechanisms do exist, but that they are often inadequately implemented.

All the interviewed women can rely to varying degrees on the personal support of their family, friends, or employers (Colvin, 2013, p. 24). All the women name their husbands or partners as important sources of support: they helped them find suitable study programs, motivated them to enrol in higher education, and have helped financially and with childcare. "*My husband supports me, especially by saying again and again how great he thinks it is and on the other hand, of course, he motivates me again and again – especially now with the written assignments*" (Anne). "*So he takes on a lot of care work, he also supports me master the content, because he is a finished doctor and without him, my studies would not be so easy, I think*" (Danielle). Julia's and Danielle's own families and/or their partner's families and even friends support them by caring for their children. Friends were also named as important motivators providing them with mental or emotional support. Fellow students are a valuable support mechanism for all the women we interviewed, especially for Danielle, who relies on her peers to aid her in overcoming the barriers she faces due to her visual impairment by helping her read and follow the lectures. She says: "*Without them, my studies wouldn't work at all. They support me when my disability gets worse. They also support me by looking after my son*" (Danielle). Without them, she would not have been able to progress in her studies and in life the way she has. Julia feels supported by her employer, who is also her aunt, providing her with the necessary flexibility to choose her hours and working days. Danielle is also free to schedule her own working hours, but considers it a normal procedure at her workplace rather than special employer support. Anne worked and studied for two years, and, although her employer tried to accommodate her course schedule, it did not always work. Anne eventually felt it was easier for everyone to work with someone who was more flexible than a student, which is why she quit in the end.

Mature Women in Higher Education in India

Higher education system

The Indian education system is mainly divided into four parts – primary, middle, secondary, and higher education. Almost all students aged 18 and older enter HE after completing their secondary and senior secondary schooling. We do not have the data on transition and dropout rates of Indian female students at higher secondary and higher education levels, but the transition and dropout rates of Indian female students from lower secondary (9–10) to higher secondary education stand at 79.3 and 12.3 per cent, respectively (Government of India, 2022b). These data illustrate the dire need for structural mechanisms to bring these dropout women back into the fold of education.

The HE enrolment of female students in India is closely related to parental education. According to Desai et al. (2010), illiterate parents believe that investing in their daughters' education is a waste of money and resources because their sons will support the family financially after they are employed; these parents hardly consider that their daughters can work and do the same. According to Anuradha et al. (1999), North Indian parents have traditionally had lesser expectations for their daughters' than for their sons' education. Higher education for women is also impeded by outdated and conservative local cultural norms and values. Parents believe that their primary role is to arrange their daughter's marriage, rather than provide for her education. As a result, the practice of early marriage in rural India severely affects the education of women (Channa, 2010).

The limited number of public universities is also a challenge for the underprivileged categories to access HE in India. There are huge disparities in fees between public and private universities. Marginalized women have difficult accessing public universities in low-income countries like India, where per capita income stands at less than $2.5k.

Enrolment statistics

The Indian higher education system consists of public and private educational institutes. The public institutes are classified into three categories – central, state, and deemed-to-be universities – since education is in the concurrent list, which is shared by both federal and state governments. A total of 1,113 universities are registered in India. Out of these, 657 are government-supported (central government: 235, state government: 422), 10 are private deemed (aided), and 446 are private (unaided). There are 17 universities exclusively for women (14 state public universities, 2 private universities and 1 deemed private aided). In 2020–21, there were 16 open universities (1 central university, 14 state universities, and 1 state private university) and 112 dual mode universities.

Figures 3 and 4 show the total enrolment of women and men in Indian higher education, which clearly illustrates the increase of both men and women in higher educational institutes (Government of India, 2022c). According to the

2020–2021 All India Survey on Higher Education (AISHE) (Government of India, n.d.), a total of 21,237,910 women (48.7%) and 20,142,803 men (51.3%) were enrolled in HE.

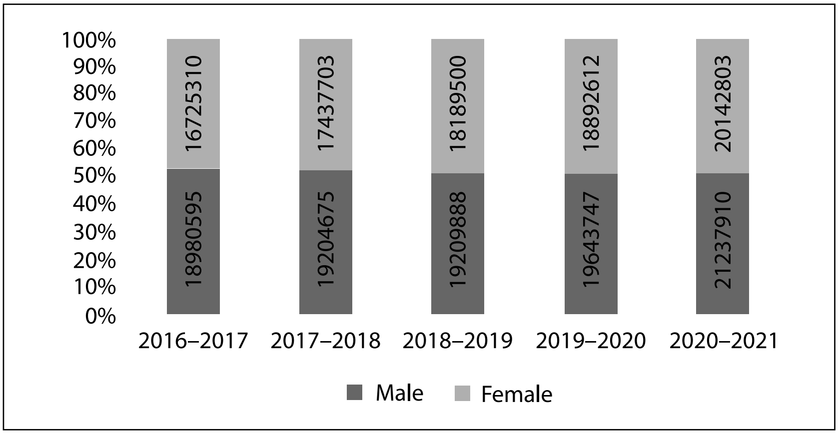


Figure 3. Gender-wise enrolment in higher education, (Government of India, n.d., p. 40)

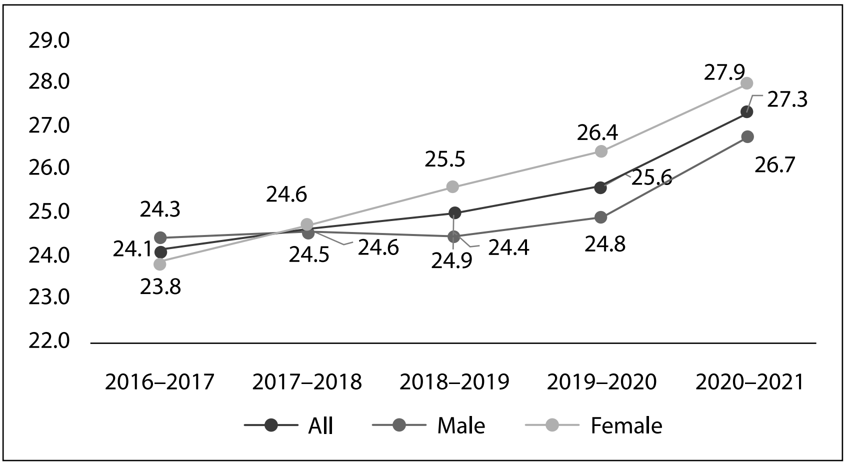


Figure 4. Gender-wise Gross Enrolment Ratio (GER) of last 5 years, (Government of India, n.d., p. 48)

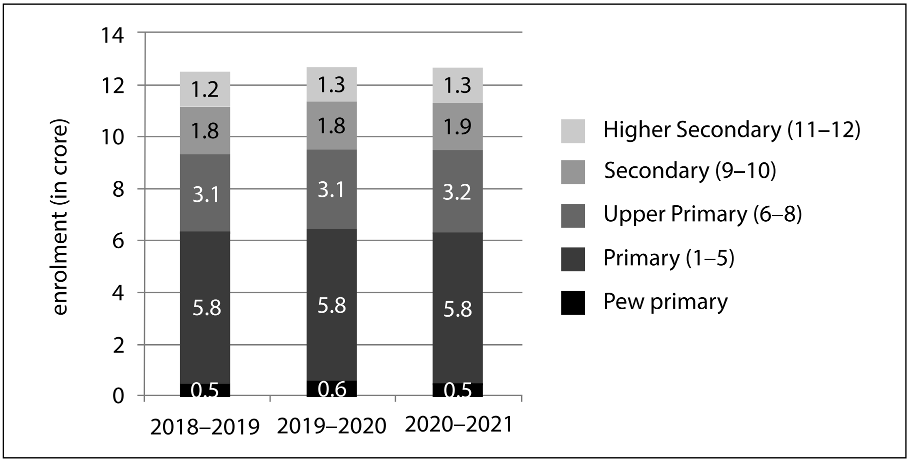
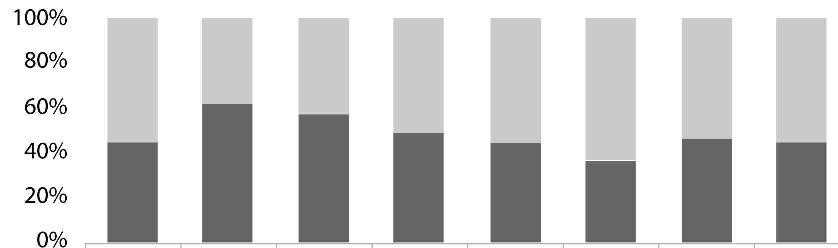


Figure 5. Enrolment of girls (in Crore), India from 2018–2019 to 2020–2021, (Government of India, 2022c, p. 13)



	Ph.D.	M.Phil.	Post Graduate	Under Graduate	PG Diploma	Diploma	Certificate	Integrated
Male	116764	6345	2053794	16747674	143723	1873568	83841	212201
Female	95088	10399	2662855	15909835	113464	1105752	72070	173340

Figure 6. Gender-wise distribution of enrolment at different study levels, (Government of India, n.d., p. 13)

Comparison of the UDISE+ 2021–22 (Government of India, 2022b) (Figure 5) report with the AISHE report (Government of India, n.d.) (Figure 6) suggests an inferential argument regarding the female dropout rate in Indian HE. According to the data of UDISE+ (Government of India, 2022c), a total of 1.2 crore female students were enrolled in higher secondary schools in India in the year 2018–19. If we compare these data to the enrolment of female students (>1.5 crore) in undergraduate courses from the 2020–21AISHE report (Government of India, n.d.), we can find more than 40 lakhs new admissions to undergraduate courses of higher educational institutes. These can be the dropout women who re-entered educational institutions to continue their studies. These numbers might be higher because the transition rate of female students from higher secondary to undergraduate courses is not 100 per cent. True, the Indian government has made several efforts to increase the Gross Enrolment Ratio (GER) of females in educational institutions, but these initiatives primarily focus on girls in the younger age group and do not address the specific challenges faced by dropout women who wish to pursue higher education. Dropout women face several challenges in accessing and completing higher education, such as family responsibilities, financial constraints, lack of support systems, and societal attitudes towards women's education. To address these challenges, there is a need for policies that specifically target mature women and provide them with the necessary support to pursue higher education.

Motivations, barriers, and mechanisms of support

Savita, Padma, and Jayanti are married women and have parental responsibilities. Of the three, only Padma is engaged in paid employment. Family, which holds a very special significance in the lives of these mature women, emerges as their primary motivation to resume their academic journeys. Their goal is not to improve the material and financial conditions of the household, as proposed by Clayton and Smith (1987), but to support their children's educational path.

Savita is motivated by the changing scenario of her responsibilities. After getting married and becoming a mother, she felt an increasing responsibility to support her family. "*Growing responsibility for family needs and for giving the best life to my son, I decided to continue my studies*" (Savita) are her main reasons for attending HE. Family responsibilities, and the desire to provide better opportunities for their child have also motivated Padma to continue her studies. She recalled the situation when she aborted her studies after getting pregnant. Her marriage was arranged at the time she was working as a media/radio scriptwriter. She continued working after she married, but had to quit when she got pregnant. When her family situation became stable and her child got older, she decided to pursue a HE vocational course and have a paid job. Family is also Jayanti's main motivation to continue her studies. Since Jayanti (47) is the oldest respondent, there is a huge time gap in her experience. She recalled the time when women did not have much freedom to choose what was right for them. "*But after several years, I found myself excluded from important family discussions. I felt embarrassed when my children asked me questions, and I didn't know the answers. Also, when other society women talked about their educational orientations, I regretted discontinuing my studies. I decided to continue my studies to upgrade my knowledge, and to make peace with my children and family,*" (Jayanti).

Savita, Padma, and Jayanti experienced institutional barriers to some extent (Colvin, 2013). Savita explained that the "*By its 10th plan, the University Grant Commission in India introduced a childcare scheme to provide day care facilities for its employees and students. But this is a paid facility and not available in every department. I think every university should provide free childcare facilities for students so that more women can enrol in higher education programmes and keep up good attendance*".

All the mature women had to contend with various situational barriers. Financial problems remain an important barrier for all of the interviewees due to the high costs of attending HE in light of the GDP per capita. They had difficulty balancing their family chores and formal education. Rural India is dominated by patriarchal norms and conservative values, which prevent women from going outside, meeting other people, and even showing their face to anyone. Jayanti had to cope with the "*lack of expectation from parents and family (….). But I continued my studies*". According to Savita: "*In our village, no woman is allowed to pursue her schooling. I was very scared when I asked my husband and family for the first time. They said no but I didn't give up. I was slapped and beaten many times for wanting to continue my studies. But, finally, at one point, they agreed".* Likewise, these women highlighted as major challenges "dispositional barriers", like devaluation of experience, fear of slow learning, and fear of what society and other students think about them.

All the barriers mature Indian women had to face could not be overcome without support provided by the institution itself, their family, parents, friends, and employers. All respondents were supported by their family and peers, but the first obstacle they faced was getting their support in the first place. Savita found that "*family support is mandatory for every dropout female to restart her academic journey. This is not limited to married women, even in rural areas, many unmarried girls were forced to discontinue their studies, because their family has other priorities*". All interviewees agreed that they benefitted immensely from peer support. Since Padma was the only working woman before she started her studies, she said the same about employer support. Peers helped Padma to identify colleges/universities, choose courses, and sometimes encouraged her to persevere. Jayanti is also very thankful to her friends, pointing out that her friend had even convinced her husband and family to support her decision.

Distance learning is identified by Indian mature women as the most important institutional mechanism of support to facilitate access to and persistence in HE. Padma agreed that open and distance learning mechanisms opened the door of opportunity for many dropout women. She suggested that "*university systems should add online lectures in their websites so that women such as housewives can easily take lectures on managing their time and work/when they have the time. Also, they should focus on making education more focused on skill and gender-sensitive to provide skills and value to non-traditional students*". Such institutions offer support for women to pursue their studies hassle-free. They have prepared class schedules bearing in mind the time and availability and adopted a blended learning approach (both online and offline classes) to ensure maximum participation and attendance by such women.

Distance education and blended learning methods become a boon for these dropout women to pursue their academics effectively. This is why enrolment in distance education institutes is significantly increasing. Savita has benefitted from the blended learning approach adopted by institutes to benefit non-traditional students. Expressing her gratitude, she said, "*Professors from university support me in carrying out my studies hassle free. They prepared our class schedule bearing in mind our time and availability so that all of us can attend as many classes as possible; my department has also adopted a blended learning approach (both online and offline classes) to ensure the maximum participation and attendance*". These challenges could not be overcome without support provided by the institution itself. Jayanti, who lives in a rural area, pointed out that her learning was difficult due to lack of institutional support, like childcare, special classes and service schedules, and special learning assessments. The statements of these mature women seem to suggest a relationship between HE attendance conditions and the territory, with women residing in urban areas reporting more favourable institutional conditions for their learning process.

Comparative Analysis: Being a Mature Women Student in HE

Looking at the discourses of German and Indian mature women attending HE, we can find more differences than similarities due to each country's social, cultural, and economic characteristics.

Germany is a highly developed European country with a well-established welfare regime and a strong economy. According to Esping-Anderson (1990), Germany is a conservative-corporatist welfare regime, characterized by a high degree of coordination between the state, employers, and labor unions. Germany has an extensive social insurance system that covers various aspects of social protection, including healthcare, unemployment benefits, old-age pensions, and disability benefits, and a comprehensive healthcare system. Germany has strong labor market policies aimed at protecting workers' rights, including regulations on working hours, minimum wages, generous parental leave policies and a well-developed education and training sector in spite of rigorous early-age tracking. In German society, education and training can be considered as the most significant vehicles for promoting social mobility. Germany is a coordinated market economy and one of the world's largest and most advanced economies. Women's rights and gender discrimination in Germany, like in many countries, have evolved significantly over the years. Germany has a rich history of women's rights activism, with significant milestones dating back to the 19th century. Women in Germany gained the right to vote in 1918, and the Weimar Constitution of 1919 included provisions on gender equality. Germany has strong legal provisions on gender equality. Article 3 of the German Basic Law (*Grundgesetz*) guarantees equal rights to all citizens regardless of gender. It prohibits discrimination based on sex. However, gender discrimination in the workplace remains an issue. Although women constitute a substantial share of the German workforce, they are often underrepresented in leadership positions and continue to face a gender pay gap (Tahir, 2020).

India is a diverse and complex country with a variety of characteristics in terms of its welfare regime, type of capitalism, social mobility, women's rights, and gender discrimination. India is the most populous country in the world. It is composed of 28 states where 1,721 different languages are spoken. The official languages are English and Hindi, although the former is spoken by a very small percentage of the population. India has a mixed welfare regime that combines elements of both a traditional welfare state and a market-oriented approach. The Indian government provides various social welfare programs and subsidies to address poverty and inequality, including schemes for healthcare, education, and food security. However, the effectiveness and coverage of these programs can vary widely. India became a powerful economy and a part of the BRIC countries with a state-permeated market economy (Schedelik et al., 2021).

India combines elements of both market capitalism and state intervention. While the country embraced market-oriented reforms and liberalization inthe 1990s, the government still plays a significant role in various sectors, including banking, infrastructure, and public enterprises. Social mobility in India is a complex issue, and there are significant barriers to upward mobility. Education plays an important role in social mobility chances, especially for women, but the effect of factors, such as caste, class, gender, and region, plays a crucial role in determining opportunities for social advancement (Vaid, 2016). India has made significant progress in recognizing and legislating women's rights. The Constitution of India guarantees equal rights to women, and various laws have been enacted to address issues such as dowry, domestic violence, and workplace harassment (Government of India, 2022a). However, the effective enforcement of these laws and social attitudes towards gender equality vary widely across the country (Saryal, 2014). Gender discrimination remains a pressing issue in India. Despite legal protections, women often face discrimination in various aspects of life, including education, employment, and within their families. Issues such as female feticide, child marriage, and sati continue to be prevalent in some parts of the country (Saryal, 2014).

Despite the importance of agency, the experiences of mature women who participated in this study are inseparable from the institutional, economic, and social arrangements in which they occur. It is not surprising, therefore, that the motivations that led to their enrolment in HE are quite different. Engaged in the job market, where they pursue a profession, mature German women explain their enrolment in HE by their desire to enhance their career advancement opportunities or even professional reorientation. Their self-improvement intent is clearly in the service of a vocational orientation aimed at improving their professional situation. Although the decision to resume their studies is legitimized by an intrinsic orientation driven by the desire for change and personal development, the primary reason is, without a doubt, of an extrinsic nature, aiming to increase career opportunities. To some extent, these women adhere to the principles of human capital theory and believe in the possibilities of professional mobility in a job market that values education and academic credentials. Unlike the German participants, only one Indian woman is engaged in the labor market and has a paid job. For mature Indian women who participated in the study, family is the primary motivation for pursuing higher education. However, their understanding of family differs from what is presented in the study by Clayton and Smith (1987). Their desire for self-improvement primarily aims to assist their children in their educational paths, rather than to contribute to the family budget, as seen in Clayton and Smith's (1987) research. In this sense, their enrolment in HE is not an individual investment in obtaining qualifications that can be negotiated in the labour market, but rather an individual decision, the returns of which will be felt in the increased educational opportunities for their children.

The women from both countries mention the existence of institutional, situational, and dispositional barriers (Colvin, 2013), although these take on, in some cases, different configurations depending on the country. From an institutional perspective, mature women in both countries converge in identifying issues related to schedules unfriendly towards women, and the absence of childcare facilities or the difficulty of accessing them when they do exist at the institution they attend. The most significant situational barriers in the lives of mature women in both countries are the balance between education and family and financial issues, which are particularly important in Indian society, where fees, even in public universities, are very high considering the per capita GDP. All the interviewed women had doubts before or at the time of enrolment in HE. However, what distinguishes women from the two countries the most is the struggle that Indian women had to endure to gain the right to access HE and overcome their families' negative expectations. In terms of dispositional barriers, these women not only had to deal with fear of failure, but also had to overcome the prejudices of a deeply patriarchal society where women's rights are still far from being respected, especially in rural areas (Saryal, 2014).

All the women identify mechanisms of institutional support (Colvin, 2013), although in some cases, they criticize their ineffectiveness. However, the significant difference lies in the importance that mature Indian women attach to distance education. This modality seems to play a crucial role in their access to education, especially in rural areas, as it allows them to bypass traditional values that limit women's freedom of movement while facilitating the balance between education and family responsibilities. Finally, all the women report the existence of individual support mechanisms where friends, colleagues, and even employers play an active role. A major difference lies in the complete absence, as mentioned by the Indian women, of any reference to effective support from husbands or even extended family. True, they had to rely on the support of their husbands because otherwise, they would not be studying, but this support amounts to nothing more than consent in a society marked by patriarchal values and a deep division of domestic labor along gender lines.

Final Remarks

The research results require particular caution given the limited number of interviews conducted. Despite this limitation, they point to some important aspects. Comparison of the experiences of mature women in two countries as different as Germany and India draws attention not only to the structure of opportunities but also to the dominant cultural values that affect their experiences in higher education. The identified differences, such as the significance attributed to the family as a motivational orientation by mature Indian women, or the weight of patriarchal values as a situational barrier that these women have to overcome, highlight the ethnocentric nature of some of the theoretical propositions that underpinned this research.

References

Anuradha, D., Samson, M., Noronha, C., Dreze, J., Kumar, P., Kumar, A. K., & Sinha, A. (1999). *Public Report on Basic Education in India*. Oxford Univ. Press.

Autor:innengruppe Bildungsberichtserstattung. (2020). *Bildung in Deutschland 2022: Ein indikatorengestützter Bericht mit einer Analyse zum Bildungspersonal* (1st ed.). W. Bertelsmann Verlag.

Bardin, L. (1988). *Análise de conteúdo*. Edições 70.

Channa, S. (2010). What Do People Live On? Living Wages in India. *Anthropology of Work Review*, *31*, 15–29. https://doi.org/10.1111/j.1548–1417.2010.01038.x

Clayton, D. E., & Smith, M. M. (1987). Motivational Typology of Reentry Women. *Adult Education Quarterly*, *37*(2), 90–104.

Colvin, B. B. (2013). Where is Merlin when I need him? The barriers to higher education are still in place: Recent re-entry experience. *New Horizons in Adult Education and Human Resource Development*, *25*(2), 19–32. https://doi.org/10.1002/nha.20014

Cross, K. P. (1984). *Adults as Learners: Increasing Participation and Facilitating Learning. Jossey-Bass Classics*. Jossey-Bass Publ.

Desai, S., Dubey, A., Joshi, B. L., Sen, M., Sharif, A., & Vanneman, R. (2010). *Human development in India: Challenges for a society in transition*. Oxford Univ. Press.

Egetenmeyer, R. (2012). Informal Learning of managers in a multinational company in Germany, Great Britain and Spain: an Intercultural Comparison. In M. Bron JR. & J. Reischmann (Eds.), *Proceedings of ISCAE Conferenc* (pp. 77–89). ISCAE.

Esping-Anderson, G. (1990). *The three worlds of Welfare Capitalism*. Princeton University Press.

Finnegan, F., Merrill, B., & Thunborg, C. (2014). *Student Voices on Inequalities in European Higher Education: challenges for theory, policy and practice in a time of change.* Routledge.

Freitag, W. K. (2012). *Zweiter und Dritter Bildungsweg in die Hochschule: Arbeitspapier, No. 253*. Düsseldorf. Hans-Böckler-Stiftung. https://www.econstor.eu/bitstream/10419/116715/1/hbs_arbp_253.pdf

Government of India. (Ed.). (n.d.). *All India Survey on Higher Education 2020–21.* Ministry of Education. https://aishe.gov.in/aishe/viewDocument.action?documentId=352

Government of India. (2022a). Constitution of India. Retrieved from https://cdnbbsr.s3waas.gov.in/s380537a945c7aaa788ccfcdf1b99b5d8f/uploads/2023/05/2023050195.pdf

Government of India. (Ed.). (2022b). *Report on Unified district information system for education 2021–22: Flash Statistics.* Ministry of Education. https://udiseplus.gov.in/#/page/publications

Government of India. (Ed.). (2022c). *Unified District Information System for Education Plus (UDISE+): 2021–22. Flash statistics.* Ministry of Education. https://dashboard.udiseplus.gov.in/assets/images/pdf/UDISE+2021_22_Booklet.pdf

Guerra, I. C. (2006). *Pesquisa qualitativa e análise de conteúdo: Sentidos e formas de uso*. Principia, publicações universitárias e científicas.

Guimarães Duarte, A., Abusamra, A., Alves, N., & Rosemann, T. (2023). Mature women in higher education: A comparative study in Germany, Palestine, and Portugal. In L. Breitschwerdt, J. Schwarz, & S. Schmidt-Lauff (Eds.), *Comparative Research in Adult Education: Global Perspectives on Participation, Sustainability and Digitalisation* (pp. 51–67). wbv Publikation.

Khanan, S. (2023). The Role of Higher Education in Empowerment of Women. *Research Review*, *73*(1), 37–41.

Mallia, C. (2010). *Mature Women Students and Higher Education: Do their skills count?* University of Nottingham. https://eprints.nottingham.ac.uk/11821/1/thesis.pdf

Merrill, B. (2021). Understanding Women's Lives through Critical Feminist Perspectives:: Working-Class Women Students in Higher Education. In A. Bainbridge, L. Formenti, & L. West (Eds.), *Research on the education and learning of adults: volume10. Discourses, dialogue and diversity in biographical research: An ecology of life and learning* (pp. 143–156). Brill | Sense.

Merrill, B., & Fejes, A. (2018). Editorial: Intersectionality and adult education. *European Journal for Research on the Education and Learning of Adults*, *9*(1), 7–11. https://doi.org/10.3384/rela.2000–7426.relae15

Merrill, B., & Revers, S. (2023). Working-Class Adult Students: Negotiating Inequalities in the Graduate Labour Market. In P. Siivonen, U. Isopahkala-Bouret, M. Tomlinson, M. Korhonen, & N. Haltia (Eds.), *Rethinking Graduate Employability in Context* (pp. 225–247). Springer International Publishing. https://doi.org/10.1007/978–3–031–20653–5_11

O'Shea, S., & Stone, C. (2011). Transformations and self-discovery: mature-age women's reflections on returning to university study. *Studies in Continuing Education*, *33*(3), 273–288. https://doi.org/10.1080/0158037X.2011.565046

Patel, K. J. (2023). Empowerment of women through higher education in India. *International Journal of Multidisciplinary Educational Research, 12*(6:4).

Ruthven-Murray, P. (2012). *Was soll ich studieren? Alle Antworten auf die richtige Studienwahl*. Hogrefe.

Saryal, S. (2014). Women's Rights in India: Problems and Prospects. *International Research Journal of Social Sciences*, *3*(7), 49–53. https://nbse.in/super/linkdoc/5be92fc90bc14WOMEN'S%20RIGHTS.pdf

Schedelik, M., Nölke, A., Mertens, D., & May, C. (2021). Comparative Capitalism, Growth Models and Emerging Markets: The Development of the Field. *New Political Economy*, *26*(4), 514–526. https://doi.org/10.1080/13563467.2020.1807487

Singh, M., & Kumar, S. (2023). Role of higher education in empowering the status of women.: Sustainable Development Goals in SAARC Countries: Key Issues, Opportunities and Challenges. *Jyotikiran Publication*(I), 123–128. https://doi.org/10.5281/zenodo.8049935

Statista Research Department. (2023). Germany – Gross Domestic Product (GDP) per Capita in Current Prices 2028. Retrieved from https://www.statista.com/statistics/295465/germany-gross-domestic-product-per-capita-in-current-prices/

Statistisches Bundesamt. [Destatis]. (n.d.). GENESIS-Online: Studierende: Deutschland, Semester, Nationalität, Geschlecht, Angestrebte Abschlussprüfung. Retrieved from https://www-genesis.destatis.de/genesis/online

Statistisches Bundesamt [Destatis]. (2022). *Bildung und Kultur. Schnellmeldungsergebnisse der Hochschulstatistik zu Studierenden und Studienanfänger/-innen—Vorläufige Ergebnisse. Wintersemester 2022/2023*. Retrieved from https://www.statistischebibliothek.de/mir/servlets/MCRFileNodeServlet/DEHeft_derivate_00074110/5213103238004.pdf

Tahir, M. W. (2020). Combating discrimination at workplaces through mainstreaming 'gender' and 'integration' needs in legislation: Testing a new analytical framework in Germany and Sweden. *Women's Studies International Forum*, *81*, 1–13. https://doi.org/10.1016/j.wsif.2020.102380

Teichler, U., & Wolter, A. (2004). Zugangswege und Studienangebote für nicht-traditionelle Studierende, *13*(2), 64–80. https://doi.org/10.25656/01:16487

Tieben, N. (2020). Non-completion, Transfer, and Dropout of Traditional and Non-traditional Students in Germany. *Research in Higher Education*, *61*(1), 117–141. https://doi.org/10.1007/s11162–019–09553-z

UNESCO. (2021). *Women in higher education: has the female advantage put an end to gender inequalities?* United Nations Educational, Scientific and Cultural Organization and UNESCO International Institute for Higher Education in Latin America and the Caribbean. https://unesdoc.unesco.org/ark:/48223/pf0000377182

Vaid, D. (2016). Patterns of social mobility and the role of education in India. *Contemporary South Asia*, *24*(3), 285–312. https://doi.org/10.1080/09584935.2016.1208637

Varghese, N. V., & Sabharwal, N. (2023). *India Higher Education Report 2022*. Routledge India. https://doi.org/10.4324/9781003415916

Wolter, A. (2013). Germany: Non-traditional students in German higher education: Situation, profiles, policies and perspectives. In H. Schütze & M. Slowey (Eds.), *Higher Education and Lifelong Learners: International Perspectives on Change* (pp. 48–66). Routledge.

Wolter, A. (2022). Hochschulzugang für nicht-traditionelle Studierende: Ursprünge, Wandel, aktuelle Dynamiken. In C. Kerst & A. Wolter (Eds.), *Higher Education Research and Science Studies. Studierfähigkeit beruflich Qualifizierter ohne schulische Studienberechtigung* (pp. 25–66). Springer Fachmedien Wiesbaden. https://doi.org/10.1007/978–3–658–35429–9_3.

Ana Guimarães Duarte[8]
Univerzitet u Lisabonu, Portugalija

Lotta Buron[9]
Univerzitet u Duisburgu-Esenu, Nemačka

Natália Alves[10]
Univerzitet u Lisabonu,
Portugalija

Sarah Schmidt[11]
Univerzitet Julius-Maximilians u Vircburgu,
Nemačka

Siddhant Singh[12]
Univerzitet u Delhiju, Indija

Vanessa Beu[13]
Univerzitet Julius-Maximilians u Vircburgu,
Nemačka

Žene kao netradicionalni studenti u visokom obrazovanju u Nemačkoj i u Indiji[14]

Apstrakt: Broj netradicionalnih studenata u visokom obrazovanju poslednjih godina raste širom sveta. Vlasti i visokoškolske institucije podstiču upis nedovoljno zastupljenih kategorija, često radi ostvarenja dva cilja: unapređenja nacionalne privredne konkurentnosti i jačanja socijalne inkluzije tradicionalno isključenih grupa, poput starijih studenata, u više obrazovanje. Ne postoji nijedna politika, a ni akademski konsenzus o tome šta se podrazumeva pod zrelim studentom (O'Shea & Stone, 2011). U ovoj studiji definišemo zrele ženske studente kao one koje su bile najmanje 21 godinu stare kada su počele osnovne studije. U analizi sedam intervjua sprovedenih u Nemačkoj i Indiji se primenom komparativnog metoda koji je razvio Egetenmeyer (2012) porede njihovi socijalno-demografski profili, njihova motivacija da studiraju, prepreke koje su morale da prevaziđu, kao i mehanizmi podrške na koje su mogle da računaju. Rezultati ukazuju na to kako sistemski uslovi mogu da olakšavaju ili osujećuju pristup zrelih žena višem obrazovanju i (ne) doprinose njihovoj istrajnosti da završe fakultet.

Ključne reči: više obrazovanje, zrele žene, Nemačka, Indija

8 Ana Guimarães Duarte je doktorantkinja i istraživačica na Univerzitetu u Lisabonu u Portugaliji (anaguimaraesduarte@outlook.com).

9 Lotta Buron je studentkinja master studija Univerziteta u Duisburgu-Esenu, u Nemačkoj (lotta.buron@stud.unidue.de).

10 Natália Alves je docentkinja i istraživačica na Univerzitetu u Lisabonu u Portugaliji (nalves@ie.ulisboa.pt).

11 Sarah Schmidt je studentkinja master studija na Univerzitetu Julius-Maximilians u Vircburgu u Nemačkoj. (sarah.schmidt08@aol.com).

12 Siddhant Singh je doktorantkinja na Univerzitetu u Delhiju u Indiji (ssingh.mphil@ace.du.ac.in).

13 Vanessa Beu je doktorantkinja i istraživačica na Univerzitetu Julius-Maximilians u Vircburgu u Nemačkoj. (vanessa.beu@uni-wuerzburg.de).

14 Ovaj rad su podržali ERASMUS+ Blended Intensive Program (BIP), Grant No. 2022-1-DE01-KA131-HED-000057161-1, i Human Dinamics Center (HDC) Fakulteta humanističkih nauka Univerziteta Julius-Maximilians u Vircburgu.

AS Andragoške studije, issn 0354–5415, broj 11, decembar 2023, str. 65–88
© Institut za pedagogiju i andragogiju; Pregledni naučni rad
UDK 37.014:[374.7:376(540)(430)
doi: 10.5937/AndStud2302065S

Silke Schreiber-Barsch[1]
University of Duisburg-Essen, Germany

Kumar Gaurav[2]
University of Delhi, India

Lukas Eble[3]
University of Duisburg-Essen, Germany

Inclusive Adult Learning and Education in India and Germany: On the Intersectionality of Class and Caste with Disability[4]

Abstract: This conceptual paper tackles the subject of inclusive adult learning and education, comparing the cases of India and Germany. Whereas the United Nations Convention on the Rights of Persons with Disabilities (UNCRPD) provides a policy framework for the overdue implementation of an 'inclusive education system and lifelong learning' (UNCRPD 2006, Art. 24), the global lack of comparable statistical data on adults with disabilities and the realities of being marginalised in, or even excluded from, the community of lifelong learners continue (e.g. UNESCO, 2019; WHO, 2007). The current comparative analysis follows landmark theoretical works on intersectionality (Crenshaw, 1989) and ableism (Campbell, 2009) and draws upon the categories of class (Candeias, 2021; Goldberg, 2018) for the German case and caste (Kothari et al., 2020; Yengde, 2022) for the Indian case and their intersectional impacts on disability and lifelong learning, discussing empowering and oppressive effects on adult learners.

Keywords: inclusive adult education, India, Germany, caste, class

---

[1] Silke Schreiber-Barsch, PhD, is a Professor at the University of Duisburg-Essen, Germany (silke.schreiber-barsch@uni-due.de).

[2] Kumar Gaurav, MA, is a Research Scholar at the University of Delhi, India (kumargaurav4du@gmail.com).

[3] Lukas Eble, MA, is a Research Assistant at the University of Duisburg-Essen, Germany (lukas.eble@uni-due.de).

[4] This work was supported by the ERASMUS+ Blended Intensive Programme (BIP), Grant No. 2022-1-DE01-KA131-HED-000057161-1 and the Human Dynamics Centre (HDC) of the Faculty of Human Sciences of the Julius-Maximilians-Universität Würzburg.

Introduction

This conceptual paper tackles the issue of inclusive adult learning and education, comparing the cases of two nation-states separated by a vast geographical distance: India and Germany. The point of departure for this analysis was the following observation: Despite the legally binding instrument and policy framework that the United Nations Convention on the Rights of Persons with Disabilities (UNCRPD) provides to its States Parties for establishing minimum standards for and claiming the overdue implementation of an 'inclusive education system and lifelong learning' (UNCRPD, 2006, Article 24), the global lack of comparable statistical data on adults with disabilities and the realities of being marginalised in, or even excluded from, the community of lifelong learners still continue to a striking degree (e.g. UNESCO, 2019; WHO, 2007). This underlines the gap in transferring policy into action and into lifelong learning realities, as well as the gap in the existing body of research and knowledge on the issue. The present paper is intended to contribute to minimising this research-related gap.

To accomplish this, we employed methodological approaches from qualitative comparative education research that sought to understand educational phenomena within the framework of an interpretive and ideographic design (Fairbrother, 2016; Manzon, 2016). As elaborated in earlier works (Schreiber-Barsch & Rule, 2021; Schreiber-Barsch et al., 2023), these approaches recognise the importance of contextualising and locating such phenomena historically, sociopolitically, geographically and temporally; indeed, generalisation is not their primary aim.

In the sense of comparing places (Manzon, 2016), as a country-to-country-comparison that follows the problem approach elucidated by Bereday (1964), we identified *disability in adulthood* as the *tertium comparationis* of our comparative enquiry. This meta-point of reference set the comparative basis for our unit of analysis (*policy agendas for adult education and disability*) and guided our analytical efforts not only to describe but also to capture, understand and explain the commonalities and differences identified by the comparative endeavour. Moreover, with our focus established on the societal macro-level of policy agendas, we were aligned with methodological considerations of comparative and global policy studies on adult education, following works by Milana (2018) and Lima et al. (2016). According to Milana's differentiation of such studies into distinct patterns, the enquiry dealt with in our study contributes to the aim of shifting 'attention to widespread political beliefs and cultural hegemonic principles surrounding policy developments in adult education' (2018, p. 435) in order to provide counter-evidence to political beliefs, such as those incorporated into agendas of *education for all* or *inclusive adult learning and education*. This methodological approach, therefore, ties in with Mason's (2016) argument that 'comparative education is best conceptualised as a critical social science, incorporating an emancipatory interest focused on the distribution of power and its associated attributes' (p. 253). The purpose of comparative education research is, thus, in Mason's opinion, to 'identify the axes along which educational and other goods are differentially distributed, and to disaggregate their object of study along those axes' (Mason, 2016, p. 253).

Accordingly, we draw upon landmark theoretical works on intersectionality (Crenshaw, 1989) and ableism (Campbell, 2009) and, in particular, upon the categories of class (Candeias, 2021; Goldberg, 2018), for the German case, and caste (Kothari et al., 2020; Yengde, 2022), for the Indian case, and their intersectional impacts on disability and lifelong learning. Such an intersectional approach is used to show the interconnectedness and far-reaching consequences of the interplay between political agenda setting, on one hand, and its range of impact on multiple and pivotal markers of identity, on the other hand.

We begin by defining the key elements of our understanding of the *tertium comparationis* (*disability in adulthood),* which is our point of departure for comparing commonalities and differences in our unit of analysis (*policy agendas of adult education and disability)*; we differentiated the latter, following Lima et al. (2016), into two categories: political-administrative guidelines and disability classification systems. Both categories are considered to have a profound impact on setting the realities of lifelong learning opportunities for adult learners with disabilities in India and Germany. This observation led to discussing the findings with the theoretical perspectives chosen in order to identify intersectional relations, most notably in one country, but also in a country-to-country comparison that informed the concluding remarks on the issue under scrutiny and implications for further considerations regarding a discussion on empowering *and* oppressive effects on adult learners with disabilities.

Disability and Adult Learners: A Juxtaposition of the German and Indian Cases

Before elaborating on the comparative enquiry, we must explain our understanding of the key concepts used that framed the juxtaposition of the German and the Indian cases.

Defining Key Concepts Used in the Enquiry

The *tertium comparationis* of our enquiry centres on the issue of *disability in adulthood*. In the context of this discussion, *adulthood* refers to persons who are considered adults at the age of 16 and older, as e.g., in the Programme for the International Assessment of Adult Competencies (PIAAC) survey (OECD, 2019). Beyond the temporal criteria of a particular age, adulthood is viewed globally as the beginning of the life period characterised by having completed a first (obligatory) phase of education and by taking on responsibilities related to, for example, child-rearing, family care, employment or continued education. Our understanding of *disability* adheres to the UNCRPD definition that states the following: 'Persons with disabilities include those who have long-term physical, mental, intellectual or sensory impairments which in interaction with various barriers may hinder their full and effective participation in society on an equal basis with others' (UNCRPD, 2006, Art. 1). This definition seeks to capture the category's complexity as arising from a dynamic interaction between a person's health condition (individual impairment) and the contextual factors of activities and participation (WHO, 2001). Accordingly, in this paper, we understand disability as a combination of the social and the cultural/relational/biopsychosocial models of disability.

Three conceptual models are commonly used in defining the understanding of disability (Barnes, 2014). Medical models describe a disability as a feature of the person, directly caused by disease, trauma or other health conditions, which requires medical care provided in the form of individual treatment by professionals. Disability, in this model, calls for medical or other treatment or intervention to 'correct' or 'fix' the problem with the individual. The social and cultural/relational/biopsychosocial models substantially broaden this view. The social model of disability sees it as a socially created problem and not at all as an attribute of the individual. According to the social model, disability issues demand a political response because the problems are created by an unaccommodating physical environment brought about by attitudes and other features of the social environment. The cultural/relational/biopsychosocial models emphasise the intersections across biological, social, cultural and psychological aspects, as well as attitudes, norms and personal perceptions; they also pay attention to power structures. These latter models are advocated in the field of disability studies (e.g. Goodley, 2017; Waldschmidt, 2017), where a disability is perceived 'neither as only an individual fate, as in the individualistic-reductionist model of disability, nor as merely an effect of discrimination and exclusion, as in the social model' (Waldschmidt, 2017, p. 24). Instead, the cultural model recognises 'impairment, disability and normality as effects generated by academic knowledge, mass media, and everyday discourses' (p. 24). This understanding is also informed by the theoretical approach of *ableism* (Campbell, 2009), which was one of the theoretical approaches that guided our enquiry (explained in more detail in subsequent paragraph). To sum up, in our view, a disability/impairment is something that can be congenital, acquired (e.g. by accident, through disease, due to age) and/or socially constructed, mirroring the non-arbitrary but widely ranging character of the category under scrutiny.

Against this backdrop, *inclusive* adult learning and education would explicitly not target persons with disabilities (PWDs) exclusively. On the contrary, it is meant to address all (potential) learners on an equal level and, as part of this, in particular, those individuals and/or groups with a high risk of vulnerability in the sense of being marginalised from lifelong learning opportunities, as mirrored in the United Nations Education 2030 Agenda and its Sustainable Development Goal (SDG) 4: 'ensure inclusive and equitable quality education and promote lifelong learning opportunities for all' (UN, 2015, p. 14). However, intersectionality, another theoretical approach that guided our enquiry (as described subsequently), highlights the view that the objective of SDG 4 cannot be seen as a stand-alone goal because the scope of inclusion in education as a whole is much broader and considers the many histories, identities and realities of people while continuously being updated to reflect the current needs and imperatives. Thus, like the 17 UN SDGs, intersectionality emphasises relations among a wide range of possible vulnerability factors (derived from, for example, disability, gender, income, race, age) and is of vital importance in developing multidimensional strategies to enhance access and inclusion. Such strategies targeting inclusive adult learning and education involve key aspects of taking a whole systems approach, such as transforming the whole educational environment, recognising the whole person, prioritising support for adult education professionals and practitioners, nourishing a learning-friendly environment and, finally, featuring respect for value and diversity (Schreiber-Barsch & Rule, 2021, p. 553). This approach does not seek to shift responsibility for realising inclusive adult education to only one of the parties involved or to problematise one party as the burden to overcome or the barrier to remove; nor does it promote the idea that moving towards inclusive adult education might happen beyond the legacies of power structures (Schreiber-Barsch & Rule, 2021, p. 553).

Shifting the focus to the juxtaposition of the two cases in this analysis, Germany and India, we argue, finally, that our units of analysis are appropriately comparable because the *tertium comparationis* (*disability in adulthood*) and the unit of analysis (*policy agendas for adult education and disability*) exist in both countries. Moreover, both countries have adopted and ratified the relevant United Nations Convention (UNCRPD, 2006). Thus, the same policy document has been launched in both nation-states in the sense of a 'travelling policy', introduced via intergovernmental organisations and woven into 'embedded policy' (Ozga & Jones, 2006). At the same time, this raises questions about the state of the art in both countries.

Policy Agendas on Adult Education and Disability

In the 19th century, Germany became a pioneer in establishing learning opportunities (albeit segregated) for children and young adults with disabilities (Poore, 2009); this system, however, paved the way for a highly segregated structure to develop pursuant to its classification system for impairments/disabilities. UNESCO's Salamanca process (from the early 1990s) and ratification of the relevant UN Convention (UNCRPD, 2006) in 2009 by Germany had the distinction of placing inclusive schooling on the political agenda and finally initiating a profound transformation of this highly segregated system.

Two key policy documents were launched in Germany in the aftermath of the UNCRPD. The first, adopted in 2011 ('Our Way to an Inclusive Society'; German Federal Ministry of Labour and Social Affairs [BMAS], 2011), is grounded in a rights and ethics approach. The second document, adopted in 2016, shifted to a more pragmatic approach in outlining a national action plan (BMAS, 2016a). However, it, too, contains limited references to adult learners so that the issue of inclusion in the sense of disabilities continues to be almost entirely focused on the formal context of schooling and on vocational education and training. In this formal context, the traditionally strong legal autonomy of the 16 German federal states regarding the spheres of education and culture serves as an additional barrier, as the consequence of this context is that sixteen more or less different 'inclusive education' systems exist, greatly affecting learners' mobility and range of choice across a lifespan.

In addition, as part of Germany's national action plan, a new state law on participation (*Bundesteilhabegesetz*) was passed in 2016 (BMAS, 2016b), aiming to fulfil the UNCRPD agenda and to substantially broaden the participation of PWDs in lifelong learning. Yet, it continues to be the case that courses for PWDs are predominantly provided in sheltered workshops or in care institutions without any primary adult education mandate. That means not in public spaces such as in a public adult education centre, called a *Volkshochschule* (Heimlich & Behr, 2009). Germany's public adult education centres are legitimised by their general accessibility and their public and professional mandate for providing lifelong learning to all adults, dating back to their historical roots at the end of the 19th century. At the time of this writing, about 900 centres were operating as independent legal entities under the auspices of the state, the respective federal states and the local authorities. They have been providing continued education, inhouse training and vocational certificate programmes, as well as literacy courses and the full range of liberal adult education curricula. Nonetheless, whilst bearing in mind that the database is still rudimentary, the rate of participation of adults with disabilities in their programmes remains very low (Autorengruppe Bildungsberichterstattung, 2014; Koscheck et al., 2013). The sheltered workshops, where, as noted above, most learning opportunities for adults with impairments or disabilities are provided (along with care institutions), also serve as the predominant place of employment for adult PWDs (BMAS, 2016a, pp. 119–124, 196, 222). This particularly holds true for persons labelled with an intellectual disability, who constitute 75% of the sheltered workshops' employees (Bundesarbeitsgemeinschaft Werkstätten für behinderte Menschen [BAG WfbM], 2020, p. 37). Sheltered workshops integrate persons with disabilities into the labour market and enable their participation in work; at the same time, they can be influential gatekeepers, as it is up to them to decide who is perceived as abled enough to transition to vocational training or (sheltered) jobs in the primary labour market. Furthermore, working in a sheltered workshop is not considered regular employment. Hence, these employment opportunities are decoupled from legal protections, such as those related to minimum wages or pension funds (BMAS, 2016a, pp. 163–164). Thus, despite new legislation, the sheltered workshops remain a highly segregated place for working and learning for adults with disabilities. Not surprisingly, the German Institute for Human Rights published a harshly critical conclusion in its July 2023 monitoring report on the UNCRPD's translation into practice (German Institute for Human Rights, July 2023):

> "The Monitoring Mechanism has observed with concern a misguided rhetoric of inclusion, in which different political and social stakeholders refer to segregated structures as part of an inclusive system. Duplicate structures are maintained unchanged across the board (Article 24: requirements for an inclusive school system; Article 27: vocational training, employment in sheltered workshops; Article 19: deinstitutionalisation). The Committee's 2015 recommendations on dismantling segregated systems step by step have at best been taken up hesitantly, and at worst negated." (p. 6)

India's recently launched National Education Policy, or NEP (Ministry of Education, 2020a), promises to bring revolutionary changes through equitable and inclusive education and, in fact, has received praise for intending to provide all students in the nation with unrestricted access to education primarily because, as declared by the administration, the NEP dispels darkness and ushers in a new era of inclusivity in the educational system. The goals of the new Indian educational system support the aim of creating *Atmanirbhar Bharat*, or 'Self Reliant India', by 2030 (SDG 4). In India, inclusive education has typically been achieved at the expense of excluding children with impairments. Children with disabilities frequently face a higher barrier to education; in fact, their disabilities exacerbate their access to education. As evidence, barely 50% of people with disabilities in India are literate (Ministry of Statistics and Programme Implementation [MOSPI], 2016). As further confirmation, only 62.5% of persons with impairments aged between 3 and 35have attended school (MOSPI, 2016). Thus, the policy includes various measures to guarantee the way towards a more inclusive education.

Chapter 21 of NEP 2020 (para. 4) states the following with explicit reference to adult learners: "Strong and innovative government initiatives for adult education – in particular, to facilitate community involvement and the smooth and beneficial integration of technology – will be effected as soon as possible to expedite this all-important aim of achieving 100% literacy" (Ministry of Education, 2020a, para. 21.4). As a result, the nation must achieve a 100% literacy rate and end illiteracy. To reach the goal of 100% literacy, the NEP focuses on adult literacy and calls for inclusive education.

The issue of education for PWDs is also included in Chapter 3 of India's Rights of Persons with Disabilities (RPWD) Act (Ministry of Social Justice and Empowerment, 2016). In addition to outlining concrete steps to follow to support and facilitate inclusive education, this chapter emphasises the roles and responsibilities of educational institutions. Section 18 of the Act also discusses adult education. The goal of this directive is to encourage, safeguard and ensure that PWDs participate in adult education and continuing education programmes on an equal footing with other adults.

Finally, the Indian government's *Sarva Shiksha Abhiyan* (SSA) initiative, which aims to provide elementary education for all 6–14-year-old children, including those with disabilities, addresses the issue of inclusive education. The Integrated Education for Disabled Children (IEDC) Scheme offers free education to 15–18-year-old children who fall under its purview (Ministry of Social Justice and Empowerment, 2006).

The New India Literacy Programme (NILP) 2022–27 document (Ministry of Education, 2022) envisions replacing 'Adult Education' with 'Education for All' due to the need for contextual changes and because the phrase 'Adult Education' was not appropriately used to include all illiterates aged 15 years and above. The term 'Adult Education' suggests a concentration on adults, seniors and older people. Hence, the term 'Adult Education' is expected to change to 'Education for All' in the NILP 2022–27 document to make education more inclusive.

However, criticisms have been voiced. According to those appraisals, the NEP missed the chance to include 'disability education' in the curriculum for all students, allowing for the inclusion of disability as one of the many facets of identity, which would have carried out the UNCRPD's vision for the human rights model in letter and spirit. This issue is crucial for creating an inclusive Indian society and eradicating the persistent stigma and stereotypes regarding disabilities. Although the policy has placed a focus on problems like the need for gender sensitisation, the inclusion of disability education in the curriculum might have enhanced inclusive education.

Overall, the diversity that exists in India and the needs of its diverse population require comprehensive changes and flexibility in the education system to facilitate the implementation of policies and achievement of the nation's ambitious and transformative education agenda. A multidisciplinary approach across the macro and meso levels of inclusive education is required to tackle this challenge and to initiate a transformation at the micro level of lifelong learning for all learners as well.

National Classification System Used for Disabilities

What is considered a disability or impairment differs worldwide (WHO, 2007, pp. 17–24), which not only creates a key challenge for conducting a comparative enquiry but also argues for enhancing the existing body of relevant evidence. The International Classification of Functioning, Disability and Health, or ICF (WHO, 2001), perceives disability as a dynamic interaction between a person's health condition and contextual factors (p. 4). The example of the intellectual disability (ID) subcomponent showcases the challenge: the UNCRPD and the ICF have argued against using an IQ score to classify an ID. However, in many national disability classification systems, including in Germany and India, the IQ score has been considered a necessary measure for grading the level of a person's intellectual functioning, even though its classification ends up in substantially different terminologies and conceptualisations (WHO, 2007, p. 17). For example, the equivalent term for ID (*geistige Behinderung)* has been used in Germany for persons assigned an IQ score of 55 and below since 1973 (Neuhäuser &

Steinhausen, 2013, p. 18). A score of 70 or below indicates an ID internationally, including in the United States and India, thus incorporating persons who would be diagnosed with a 'learning disability' according to Germany's standards. This example emphasises again the extent to which features that define a disability depend on national, global and/or cultural interpretations.

In Germany, in 2019, 7.9 million or 9.5% of the total population were officially recognised as having a severe disability (DESTATIS, 2021, p. 327); this number included only those who were classified officially and who were assigned a disability grade of at least 50%. Overall, the data are not clear-cut or up to date. For example, 2013 data identified a total of 299,000 persons in Germany as having an ID (assigned to persons with an IQ of 55 and below) *or* a learning disability (BMAS, 2016c, p. 46), without distinguishing between these two types. In contrast to other impairment types, the majority of people in this category (59%) were significantly younger, under 45 years old (p. 47). The German government relies on the UNCRPD in defining disability (BMAS, 2016b, Art. 2), complementing it by referring to temporal criteria: a disability/impairment in that sense is characterised, firstly, by being present for more than six months and, secondly, a condition of body and/or mind that substantially differs from the condition typical for that chronological age. Moreover, following the logic of the ICF, the act of distinguishing between different types of disabilities only exists in relation to functioning as a barrier impeding a person's participation in society. This might be an intellectual, corporal and/or mental health-related feature and must receive an officially recognised minimum disability grade of 20% to entitle access to social state benefits.

In India, a person with a benchmark disability includes a person with a grade no lower than 40% (again, highlighting the different framing mechanisms of the category from a juxtapositional view) for a specified disability as authorised by the certifying authority. The basis for assigning a disability has not yet been defined properly and people with disabilities always encounter bias. This discrimination is further exacerbated when it is compounded by caste and gender as additional factors ('cumulative discrimination'). Only a person certified as having a benchmark disability can reap the benefits of policies and schemes approved by the government of India, as well as the affirmative action guidelines prescribed at various levels of education, employment or other services.

India's RPWD Act enacted on 28 December 2016 (Ministry of Social Justice and Empowerment, 2016) defines disability based on a more evolving and dynamic concept to enhance the consonance of globally used definitions. The Act seems more inclusive as it increases the number of disability types from 7 to

21 to be added in the new amended act of 2016. The Act covers the following specific types of disabilities:

1. Physical disabilities, which include locomotor disabilities, visual impairments, hearing impairments and speech and language disabilities.
2. Intellectual disabilities, which encompass specific learning disabilities and the autism spectrum disorder.
3. Mental behaviour, referred to as mental illness, not defined specifically.
4. Disabilities caused by chronic neurological conditions and blood disorders.
5. Multiple disabilities, which are left open for interpretation and taking a more holistic approach.

The Government of India has enacted three pieces of legislation to protect the rights of the disabled population (Ministry of Social Justice and Empowerment, 2006).

1. Persons with Disabilities (Equal Opportunities, Protection of Rights and Full Participation) Act, 1995, which provides for education, employment, creation of barrier-free environment, social security and so on.
2. National Trust for Welfare of Persons with Autism, Cerebral Palsy, Mental Retardation and Multiple Disability Act of 1999, which provides for legal guardianship for the four categories and creating an enabling environment to support as much independent living as possible.
3. Rehabilitation Council of India Act, 1992, which deals with developing human resources for providing rehabilitation services.

These legal doctrines and policies address the empowerment of PWDs and seek justice for them, reflecting the idea of equity over equality.

Discussing Intersectional Relations: Disability and Class/Caste

The juxtapositions of the issues of disability and adult learners in the cases of Germany and India provide the framework for discussing this contested terrain in more depth. Depth is added to the discussion by drawing on theoretical considerations from works on ableism and intersectionality and linking them to ongoing discussions on the impacts of societal categories of class (Germany) and caste (India) on the situation of adult learners with disabilities.

Theoretical Considerations from Works on Ableism and Intersectionality

Classification systems deriving from a nation-state's social scheme and welfare logic architecture play a decisive role in the pedagogical practices of assessing and labelling a learner's abilities, the expected learning outcomes of those abilities and the respective classification of the individual disability/impairment in the context of these learning and educational processes. Campbell's (2009) landmark work on the concept of *ableism* pointed to the most influential impact of what she called the *able/not-able divide* pervading society across all its spheres, resulting in power-driven dynamics of an ability regime. Campbell defined ableism as 'a network of beliefs, processes and practices that produces a particular kind of self and body (the corporeal standard) that is projected as the perfect, species-typical and therefore essential and fully human' (Campbell, 2009, p. 5). Thus, Campbell's criticism was directed against the one-sided and often invisible social architecture of such an ability regime, in which skills and competencies are believed to determine a person's degree of functionality and society's esteem and legitimate, for example, a deficit-oriented segregation of learners according to the socially constructed definitions of who is perceived as able and not-able. This logic of an ability regime aligns in several ways with the medical model of understanding disability, not the least of which is placing complete responsibility for smoothly adapting to the ability regime's standards on the person him/herself with disability, provoking criticism from disability studies scholars. Emerging as an academic discipline in the 1980s, the disability studies make use of interdisciplinary and intersectional approaches to explore disability and impairment issues and their interdependence with social, political, cultural, economic and power-driven factors, featuring the social and cultural/relational/biopsychosocial models of understanding disability noted previously.

In recent decades, increased attention has been paid to the latter models of disability rather than to the medical model, which underpins the fundamental need to understand the main theories on disability and their concerns related to the subject matter. Additionally, more emphasis has been placed on moving towards a normative, legal, sociocultural and, consequently, on the architecture of an inclusive society due to the models' respect for and understanding of inherent cultural, historical and social perspectives and interdependencies. Such an architecture governs the impact and the framework for how learning programmes or educational/learning organisations are driven and how they influence the way services are provided and the type of interventions that are implemented under the auspices of learning and disabilities. This influence not only encompasses the critical analysis of the disability vis-à-vis cultural, historical, medical, economic, social and political phenomena, but also of the disability as being rights– and justice-based. The disability issue does not provide momentum for optional welfare or a normative ideology (Minich, 2017) for its own sake, but points to the gap created by a socioeconomic and political lack of will to support the living situations and learning realities of persons with an impairment or disability.

Following these theoretical strands, the approach of intersectionality emphasises once more the relevance and the high impact of analyses that do not elaborate in an isolated manner on categories such as age, gender or disability but, instead, explore their mutual interferences and mutual aggravations in influencing the living situations and learning opportunities of individuals and collectives by experiencing discrimination, vulnerability, marginalisation and/or exclusion. The term 'intersectionality' was coined by Crenshaw in her article, 'Demarginalising the Intersection of Race and Sex' (1989), in which she emphasises the multidimensionality of a Black woman's experience in society and the discrimination that heightens throughout that society. Both theoretical backgrounds, ableism and intersectionality, have been used to further investigate the issue of disability with respect to class and caste due to the relevance given to acknowledging the multi-categorical and mutually reinforcing nature of an ability regime's impact on learning and education.

Intersections: Disability and Class

Like the epistemological foundations and the power-driven narratives of a caste system (see the next chapter), in Germany, the debate and realities pertaining to 'doing class', and respectively, 'doing underclass' (Chassé, 2016) as dominant features of modern society are elaborated in academia and experienced by individuals and collectives in their daily contexts of living and learning. As Kothari et al. (2020) clarified about the intersection of disability and caste (chapters 1–2), a cultural studies approach of 'doing class' (Chassé, 2016) spotlights the situation– and context-related range of social interactions and social practices in which individuals, collectives, institutions and nation-states continually (re)produce their social realities and architectures for living together due to a specific set of norms, values, beliefs and, accordingly, understandings of identity markers as features of difference and diversity (Chassé, 2016, p. 38). This perspective aligns with the cultural model used to understand disability because it refuses to (re) produce class as a person's feature and responsibility (medical model) but brings attention to the social processes of (re)producing a pursuant social status with its far-reaching consequences, also for learning and education. The full extent of the relevance of class, however, derives from the distinguishing characteristic of a wage-dependency status (Candeias, 2021, p. 11), thus, aligning with the tradition of critical theory, pointing as well to the power-driven dynamics of the dominant societal order. These dynamics can be traced not only by analysing Germany's social realities, but also by considering the European nation-states, as underlined by Goldberg's (2018) work. The common features of the trans-European underclass must be recognised as indicators of a high risk of vulnerability towards crises and economic conjunctures and their positioning on the lower steps of social hierarchy (Goldberg, 2018, p. 64), parallel to missing access to a comparable amount of cultural capital and possible investments in learning and education background (p. 67).

Thus, we align with bell hooks' position that 'class matters' (2020), in particular, as it mirrors the complex interdependencies and the intersectionality of identity markers, such as disability and class. As outlined previously, the first and foremost *social* status associated with being labelled, in whatever sense, as impaired or disabled can have severe effects on access to education, ending predominantly up in low levels of school-leaving qualifications (KMK, 2020, pp. XXI–XXII) and, accordingly, in marginalised routes and vulnerable positions on the labour market due to the respective social security scheme (such as the non-existence of a minimum wage) or level of remuneration and pension. Not surprisingly, the relation that a disability, particularly an ID, has with low incomes, precarious and fragile employment possibilities and low levels of educational backgrounds is more than evident, clearly highlighting the reinforcing dynamic of being labelled as a specific kind of wage-earner in the ability regime.

Comparable to the dynamics at work at the intersection of disability and caste, the influential power of the category of class on the living and learning realities of PWDs is derived from the social consensus in an ability regime on their abilities for learning, as Edgerton emphasised back in 1967 (p. 207): 'no other stigma is as basic as mental retardation in the sense that a person so labelled is thought to be so completely lacking in basic competence'. It is also derived from the lack of material (e.g. wage levels) and immaterial (sheltered workshops as a stigmatised place of work) appreciation for their share in the labour market and, similar to the narrative of the medical model, from charging the individuals themselves with responsibility for smoothly adapting to the system at hand without questioning its underlying logics and narratives.

Intersections: Disability and Caste

The intersectionality of disability and other identity markers, like race and/or ethnicity, has been given significant focus globally thus far; however, the identity marker 'caste' from the Indian context has not become part of such comparative axes (see e.g. Kothari et al., 2020; Yengde, 2022). This is the case, despite how the failure to incorporate the marker can impact a massive segment of the planet's human population in the form of India's circa 1.4 billion inhabitants and its expected population growth, which will soon result in India replacing China as the world's most populous nation-state.

The Indian context of caste vis-à-vis the global context of race, ethnicity, gender and/or religion can be drawn in parallel terms regarding multiple axes of discrimination, inequalities and injustices. However, the issue of caste on the global level has not been given much attention because, as Yengde (2022) argues, elites from local caste systems have captured power globally as well and can suppress discussions on the caste-based issue on a global platform, after which the elites 'utilize academic canons and political debates to undermine caste-sensitive interpretations of history' (pp. 344–345). In this sense, according to Yengde, global caste 'is a form of localized slavery that exists across the world' (p. 344). Yet, due to the migration of Indians, an emancipation of caste-based discrimination has been observed on a global level. The following aspects are seen to define global caste:

> "enduring stigma, humiliation, striving for recognition as human, fear of pollution from the out-castes, strict endogamy, minority status, spiritual assent, bloodline through inheritance, control of the body politic as an accessible labour to be disposed, judicial and police officials ... in favour of caste supremacy, and denying access to basic material and non-material resources through the state and laws." (p. 345)

The Indian state officially abolished the caste system, called *jati*, in the 1950s; nevertheless, this category continues to be a highly influential and commonly used marker of identity, widening what had been narrowing ranges of opportunities in life and for learning. No all-Indian or clearly defined system of castes and their ranking exists due to a hierarchal status issue; overall, more than 3,000 castes (*jatis*) and even more sub-castes are known to currently exist. This caste system had been originally established due to the category of religion, meaning the Hindu religion, which was divided into the four main groups of *Brahmins*, *Kshatriyas*, *Vaishyas* and *Shudras* and a fifth group called 'the untouchables'

– the *Dalits*. Presently, identification with a specific group, regardless of religion, continues, which has become part of political affirmative action measures, aiming at empowering the most marginalised and vulnerable groups and ensuring their participation in decision-making processes and areas of the nation-state. Accordingly, Article 16 of the Indian Constitution, enacted in 1949, seeks to ensure 'equality of opportunity in matters of public employment' and states the following (para. 2): 'No citizen shall, on grounds only of religion, race, caste, sex, descent, place of birth, residence or any of them, be ineligible for, or discriminated against in respect of, any employment or office under the State' (Government of India, 1950, art. 16). Under the same political will, the government officially established the following castes – the SC (Schedule Caste or Dalit), ST (Schedule Tribe) and OBC (Other Backward Class) – in order to place emphasis on and better their situation and participation in society by reserving places in government positions, higher education and the legislature for them. These named castes are known to belong to the lowest stratum of the Indian castes and, thus, of Indian society and are among the groups deemed most socioeconomically disadvantaged and marginalised in India. However, in contrast to this political will, Kothari et al. (2020) recently emphasised the following:

> "[Among] the total disabled population in India, Schedule Caste ('SC') persons with disabilities were 49,27,433 and Schedule Tribe ('ST') persons with disabilities are 21,40,763 according to recent data from 2018. Despite this, the existing legislations and welfare schemes for persons with disabilities have no provisions for SC, ST and other backward castes ('OBC') persons with disabilities." (Chapter 1)

In this sense, the medical model for understanding disability is mirrored in the epistemological framework of the caste system according to the Hindu idea of *Karma* (Kothari et al., 2020, Chapter 2).

A glance at the higher education sector also showcases the intersectionality of the identity markers of disability and caste; in this sense, being from a lower caste in itself becomes a disability and serves as a barrier to accessing needed resources for learning and education, while the two markers mutually reinforce their impact on learning and living opportunities. As Table 1 shows, PWDs in the higher education sector experience an accumulation of belonging from the lower strata and face two tiers of discrimination with respect to their caste basis and disability; their participation is still minor but has been increasing in recent years. At the same time, an inclusive (adult) education has been in high demand as many people drop out of mainstream higher education because of the intersection of disability and caste barriers.

Table 1. Persons with Disabilities (PWDs) enrolled in Higher Education and their Caste Distribution

Year	Total PWD Enrolment	% of PWD-SC out of Total PWD Enrolment	% of PWD-ST out of Total PWD Enrolment	% of PWD-OBC out of Total PWD Enrolment
2011–12	65552 (0.02%)	8.1	2.1	26.1
2012–13	54119	12	4.4	31.2
2013–14	51954	8.8	2.5	26.4
2014–15	64298	10.3	2.4	32.6
2015–16	74435	10.9	2.5	32.6
2016–17	70967	11.1	2.5	30.7
2017–18	74317	9.4	2.9	28.4
2018–19	85877 (0.2%)	9.3	3.4	31.5
2019–20	92831 (0.24%)	9.4	3.4	31.6
2020–21	Data yet to be published			

Source: Ministry of Education, 2020b. All India Survey of Higher Education (AISHE). PWD = Persons with Disabilities; SC = Scheduled Caste; ST = Schedule Tribe; OBC = Other Backward Caste.

Moreover, subordination varies, as Dalits or the tribes from the lower strata of society are based on a dichotomy of purity and pollution (see also Yengde, 2022). Hence, the form of discrimination also varies, according to what occupations are practised by the SC/ST members of the community. Manual scavenging is practiced, especially by the Dalits (SCs) population. According to the Ministry of Social Justice and Empowerment (2021), more than 95% percent of the total manual scavengers, 43,797 persons, belong to the SCs.

The disparity in society in India is obviously not the product of a singular, homogeneous form of oppression. The discriminatory systems that existed before the NEP was drafted must be revisited in order to comprehend any of the topics of debate outlined herein. Thus, the reality is intersectionality, not homogeneity. Accordingly, the lives and experiences of people, who have many identities and come from various backgrounds, should be considered when developing policies and respective measures as analysing one dimension on a single axis in order to make policy decisions under the leitmotif of equality and 'education for all' would be useless. The capability approach brought forward by Amartya Sen (1984) highlights the freedom of achieving the requisite individual values. It is a moral framework that requires a social arrangement where all must be provided equal resources to promote their individual capacities and to make them universally functionable. The approach allows for the analytic differentiation that some might be capable but need more resources, whereas others may have resources but need to learn how to apply them, which aligns with the relevance of an intersectional approach. The same applies to the different forms of disabilities (21 types, RPWD Act, Ministry of Social Justice and Empowerment, 2016). Different types of disabilities require a different number of resources for PWDs to make them function universally.

In the last few decades, the interdependency of the caste system with education and its importance, together with employment options, in easing socioeconomic challenges and escaping historical shackles began to be recognised, as illustrated in the discussion on policy agendas. Lack of explicit inclusionary measures would naturally result in an exclusionary approach to the educational system in the context of India, where the history of discrimination is long. Such a policy includes the creation of 'special education zones' as one of its goals. As a result, areas of the nation with sizable populations from socially, economically and educationally disadvantaged groups will be designated special education zones, where all programmes and policies will be implemented to the fullest through additional concerted efforts to transform their educational environment. Disability studies have now started to inculcate the caste itself. However, caste-based studies focus only on caste-based discrimination, wherefore a gap emerged. The adult education policies, like the New India Literacy Programme for 2022 to 2027 (Ministry of Education, 2022) and the 2020 National Education Policy (Ministry of Education, 2020a), have focused on adult literacy and lifelong learning; however, the only subject that receives focus is disability, but it has not been interlocked with the caste category. This demands a proper hauling of the system, as well as the implementational authority to be more inclusive with respect to caste and disability.

Conclusion

In conclusion, we confirm the urgent need for contributing to lowering the existing research gap in transnational, comparative work on the issue of our *tertium comparationis*, disability in adulthood, and its impacts and realities for adult learning and education in nation-states such as Germany and India. In this sense, the paper contributes to shifting a critical gaze on, what Milana (2018) had put forward, 'widespread political beliefs and cultural hegemonic principles surrounding policy developments' (p. 435). The comparative enquiry illustrated the powerful dynamics of the intersection of disability with other identity markers, such as class and caste, and its far-reaching consequences for the precarious, restricted lifelong learning realities of (young) adults in both countries under scrutiny. In this sense, class and caste might be traced back in different academic and societal traditions of a particular nation-state. However, the consequences of these identity markers in, argued from the theoretical approaches of cultural studies, on-going processes of *doing class* and respectively *doing caste* are highly similar in positioning a substantial amount of adult lifelong learners at the far end of the peripheries of the discussed ability regimes as part of the global capitalism order, and, accordingly, of lifelong learning opportunities.

Against this backdrop, we argue that there is a need to further discuss the uniform strategy of policy agendas that seem to ignore intersectional effects and dynamics in raising oppressive barriers to learning and education even higher for those who live in most vulnerable contexts and situations. This includes, on the level of policy agendas, the need for comprehensive strategies in inclusive (adult) learning and education, spelling out the agenda up to, for example, an inclusive curriculum and inclusive learning infrastructures at education institutions. In our view, this gives rise to a particular need and attention to negotiating the often lofty objectives of policy agendas with the aim of sharing and integrating the everyday experiences and voices of those learners seen as the target group of such agendas in these processes and in these agendas. This starts with basic tasks: The most expressive way to illustrate society's incoherent concept of disability is through the usage of various terms like "inclusion", "integration", "children/adults with special needs", and "differently-abled", which continues in the vague guidelines and blind spots of classification systems that have far-reaching consequences for the particular learners. Furthermore, the issue of financial resources in moving towards an inclusive society is at stake: In India, for example, a philanthropic private model of education is also introduced as part of the National Education Policy's revamp of quality-based higher education. The implementation of disability reservations in government institutions and institutions receiving government assistance is constantly under debate, but the entry of private players into higher education would have a significant impact on the inclusion of people with disabilities in higher education. Therefore, the government and other authorities should place more emphasis on budgetary allocations for disability education, improving working conditions for teachers and special educators, removing attitudes and stereotypes regarding disability and taking steps to integrate more people with disabilities into mainstream society in order to create an inclusive and equitable society. Only then, in our view, will there be a chance to move towards the objectives of a diverse and egalitarian society, also beyond lofty policy agendas.

References

Autorengruppe Bildungsberichterstattung. (2014). Bildung in Deutschland 2014. Ein indikatorengestützter Bericht mit einer Analyse zur Bildung von Menschen mit Behinderungen. W. Bertelsmann Verlag GmbH & Co. KG.

BAG WfbM. (Bundesarbeitsgemeinschaft Werkstätten für behinderte Menschen e.V.). (2020). Neue Herausforderungen. Neue Perspektiven. Neue Wege. Jahresbericht 2020. Retrieved from https://www.bagwfbm.de/file/1437/

Barnes, C. (2014). Understanding the social model of disability. Past, present and future. In N. Watson, A. Roulstone, & S. Thomas (Eds.), *Routledge handbook of disability studies* (pp. 12–29). Routledge.

Bereday, G. Z. F. (1964). Comparative method in education. Holt, Rinehart and Winston.

BMAS. (2011). Unser Weg in eine inklusive Gesellschaft. Der Nationale Aktionsplan der Bundesregierung zur Umsetzung der UN-Behindertenrechtskonvention. BMAS.

BMAS. (2016a). Unser Weg in eine inklusive Gesellschaft. Nationaler Aktionsplan 2.0 der Bundesregierung zur UN-Behindertenrechtskonvention (UN-BRK). BMAS.

BMAS. (2016b). Bundesteilhabegesetz. Retrieved from https://www.bmas.de/SharedDocs/Downloads/DE/Gesetze/bthg.pdf?__blob=publicationFile&v=2

BMAS. (2016c). *Zweiter Teilhabebericht der Bundesregierung über die Lebenslagen von Menschen mit Beeinträchtigungen. Teilhabe – Beeinträchtigung – Behinderung*. BMAS.

Campbell, F. K. (2009). *Contours of ableism: the production of disability and abledness.* Palgrave Macmillan.

Candeias, M. (Ed.) (2021). *Klassentheorie. Vom Making und Remaking.* Argument.

Chassé, K. A. (2016). Doing Class. Wie werden Menschen zum „Prekariat“ gemacht? In K. Fereidooni, & A. P. Zeoli (Eds.), *Managing Diversity* (pp. 35–51). Springer.

Crenshaw, K. (1989). Demarginalizing the Intersection of Race and Sex: A Black Feminist Critique of Antidiscrimination Doctrine, Feminist Theory and Antiracist Politics. *University of Chicago Legal Forum, 1*(8), 139–167. https://chicagounbound.uchicago.edu/cgi/viewcontent.cgi?article=1052&context=uclf.

DESTATIS – Statistisches Bundesamt. (2021). Datenreport 2021 – Kapitel 9: Gesundheit. Retrieved from https://www.destatis.de/DE/Service/Statistik-Campus/Datenreport/Downloads/datenreport-2021-kap-9.pdf?__blob=publicationFile

Edgerton, R. B. (1967). *The cloak of competence: Stigma in the lives of the mentally retarded*. University of California Press.

Fairbrother, G. P. (2016). Quantitative and Qualitative Approaches to Comparative Education. In M. Bray, B. Adamson, & M. Mason, Mark (Eds.), *Comparative Education Research Approaches and Methods* (pp.71–93). Springer.

German Institute for Human Rights. (2023). National CRPD Monitoring Mechanism Parallel Report to the UN Committee on the Rights of Persons with Disabilities for Germany's 2nd/3rd State Party review procedure. Retrieved from https://www.institut-fuer-menschenrechte.de/fileadmin/Redaktion/Publikationen/Parallelbericht/DIMR_Parallel_Report_to_the_UN_Committee_on_the_Rights_of_Persons_with_Disabilities_2023.pdf

Goldberg, J. (2018). Soziale Klassen in Europa. *Z. Zeitschrift Marxistische Erneuerung, 116*, 61–69.

Goodley, D. (2017). *Disability studies: An interdisciplinary introduction (2nd ed.).* SAGE Publications Ltd.

Government of India. (1950). Constitution of India. Republished 2022. Ministry of Law Justice and Empowerment. Retrieved from https://legislative.gov.in/constitution-of-india/

Heimlich, U., & Behr, I. (2009). Inklusion von Menschen mit Behinderung in der Erwachsenenbildung/Weiterbildung. In R. Tippelt, & A. V. Hippel (Eds.), *Handbuch Erwachsenenbildung/Weiterbildung* (pp. 813–826). VS Verlag.

hooks, b. (2000). *Where we stand: Class matters*. Routledge.

KMK – Sekretariat der Ständigen Konferenz der Kultusminister der Länder in der Bundesrepublik Deutschland. (Ed.). (2020). Sonderpädagogische Förderung in Schulen 2009–2018. Statistische Veröffentlichungen der Kultusministerkonferenz. Dokumentation Nr. 223. Retrieved from https://www.kmk.org/fileadmin/Dateien/pdf/Statistik/Dokumentationen/Dok223_SoPae_2018.pdf

Koscheck, S., Weiland, M., & Ditschek, E. J. (2013). Wbmonitor Umfrage 2012: Klima und Strukturen der Weiterbildungslandschaft. BiBB and DIE. Retrieved from. https://www.bibb.de/dokumente/pdf/wbmonitor_Ergebnisbericht_Umfrage_2012.pdf

Kothari, J., Shaikh, A., & Agrawal, A. (2020). The Intersection of Disability and Caste. A Policy Paper. Centre for Law and Policy Research. Retrieved from https://clpr.org.in/wp-content/uploads/2020/07/Caste-and-Disability-Policy-Paper-Screen-Reader-version.pdf

Lima, L. C., Guimarães, P., & Thouma, N. (2016). Adult learning and education policies in Germany, Portugal and Sweden: an analysis of national reports to CONFINTEA VI. In R. Egetenmeyer (Ed.), *Adult Education and Lifelong Learning in Europe and Beyond. Comparative Perspectives from the 2015 Würzburg Winter School* (pp. 29–66). Peter Lang Edition.

Manzon, M. (2016). Comparing Places. Comparing Race, Class and Gender. In M. Bray, B. Adamson, & M. Mason (Eds.), *Comparative Education Research. Approaches and Methods* (pp. 97–137). Springer.

Mason, M. (2016). Comparing Cultures. In M. Bray, B. Adamson, & M. Mason (Eds.), *Comparative Education Research. Approaches and Methods* (pp. 221–257). Springer.

Milana, M. (2018). Research Patterns in Comparative and Global Policy Studies on Adult Education. In M. Milana, S. Webb, J. Holford, R. Waller & P. Jarvis (Eds.), *The Palgrave International Handbook on Adult and Lifelong Education and Learning* (pp. 421–441). Palgrave Macmillan.

Minich, J. A. (2017). Thinking with Jina B. Kim and Sami Schalk. *Lateral, 6*(1). https://doi.org/10.25158/l6.1.15

Ministry of Education. (2020a). National Education Policy 2020. Retrieved from https://www.education.gov.in/sites/upload_files/mhrd/files/NEP_Final_English_0.pdf Accessed 29 Sep 2023

Ministry of Education. (2020b). All India Survey on Higher Education 2019–20. Department of Higher Education, New Delhi. Retrieved from https://www.education.gov.in/sites/upload_files/mhrd/files/statistics-new/aishe_eng.pdf

Ministry of Education. (2022). Guidelines of New India Literacy Programme. Department of School Education and Literacy. Retrieved from https://dsel.education.gov.in/sites/default/files/2023–01/Draft_Guidelines_of_NILP.pdf

Ministry of Social Justice and Empowerment. (2006). National Policy for Persons with Disabilities. Retrieved from https://disabilityaffairs.gov.in/upload/uploadfiles/files/National%20Policy.pdf

Ministry of Social Justice and Empowerment. (2016). The Rights of Persons with Disabilities Act, 2016. Retrieved from https://www.indiacode.nic.in/bitstream/123456789/15939/1/the_rights_of_persons_with_disabilities_act%2C_2016.pdf

Ministry of Social Justice and Empowerment. (2021). Religion and Caste Factor in Manual Scavenging. Retrieved from https://pib.gov.in/PressReleaseIframePage.aspx?PRID=1776847

Ministry of Statistics and Programme Implementation. (2016). Disabled Persons in India. A statistical profile 2016. Retrieved from https://enabled.in/wp/wp-content/uploads/2017/08/Disabled_persons_in_India_2016.pdf

Neuhäuser, G., & Steinhausen, H.-C. (2013). Epidemiologie, Risikofaktoren und Prävention. In G. Neuhäuser, H.-C. Steinhausen, F. Hässler, & K. Sarimski (Eds.), *Geistige Behinderung* (pp. 15–29). Kohlhammer.

OECD (Organisation for Economic Cooperation and Development). (2019). The Survey of Adult Skills: Reader's companion (3rd ed.). OECD Publishing. Retrieved from https://doi.org/10.1787/f70238c7-en

Ozga, J., & Jones, R. (2006). Travelling and embedded policy: The case of knowledge transfer. *Journal of Education Policy, 21*(1), 1–17. https://doi.org/10.1080/02680930500391462.

Poore, C. (2009). *Disability in Twentieth-Century German Culture.* University of Michigan Press.

Schreiber-Barsch, S., & Rule, R. (2021). Shifting lenses to a participatory ethos in research: Adult learners with disabilities in Germany and South Africa. In A. Köpfer, J. W. Powell, & R. Zahnd (Eds.), *Handbook Inclusion International – globale, nationale & lokale Perspektiven auf Inklusive Bildung* (pp. 547–572). Barbara Budrich.

Schreiber-Barsch, S., Bulugu, J. B., & Eble, L. (2023). Encountering works by Nyerere and Freire: Exploring the connections between education for liberation and education for self-reliance in contemporary radical popular education. *European journal for Research on the Education and Learning of Adults, 14*(1), 79–96. https://doi.org/10.25656/01:27221

Sen, A. (1984). Rights and capabilities. *Resources, Values and Development.* Harvard University Press.

UN. (2015). Transforming our world. The 2030 Agenda for sustainable development. [A/RES/70/1]. United Nations. Retrieved from https://sdgs.un.org/2030agenda

UNCRPD. (2006). Article 24 – Education. Retrieved from https://www.un.org/development/desa/disabilities/convention-on-the-rights-of-persons-with-disabilities/article-24-education.html

UNESCO. (2019). Inclusive education for persons with disabilities – Are we making progress? Background paper prepared for the International Forum on inclusion and equity in education – Every learner matters, Cali, Colombia. Retrieved from https://unesdoc.unesco.org/ark:/48223/pf0000370386

Waldschmidt, A. (2017). Disability goes cultural: The cultural model of disability as an analytical tool. In A. Waldschmidt, H. Benessen, & M. Ingwersen (Eds), *Culture – theory – disability: Encounters between disability studies and cultural studies* (pp. 19–27). Transcript.

WHO (World Health Organization). (2001). International classification of functioning, disability and health. WHO. Retrieved from https://www.cdc.gov/nchs/data/icd/icfoverview_finalforwho10sept.pdf

WHO (World Health Organization). (2007). Atlas. Global resources for persons with intellectual disabilities. WHO. Retrieved from https://iris.who.int/bitstream/handle/10665/96353/9789241563505_eng.pdf?sequence=1&isAllowed=y

Yengde, S. (2022). Global castes. *Ethnic and Racial Studies, 45*(2), 340–360. https://doi.org/ 10.1080/01419870.2021.1924394

Silke Schreiber-Barsch[5]
Univerzitet u Duisburg-Esenu, Nemačka

Kumar Gaurav[6]
Univerzitet u Delhiju, Indija

Lukas Eble[7]
Univerzitet u Duisburgu-Esenu, Nemačka

Inkluzivno učenje i obrazovanje odraslih u Indiji i Nemačkoj: o intersekcionalnosti klase i kaste sa invaliditetom[8]

Apstrakt: U ovom radu se bavimo inkluzivnim učenjem i obrazovanjem odraslih i poredimo slučajeve Indije i Nemačke. Premda je u Konvenciji Ujedinjenih nacija o pravima osoba sa invaliditetom (UNCRPD) propisan okvir politike za sprovođenje „inkluzivnog obrazovnog sistema i celoživotnog učenja" (UNCRPD 2006, član 24), koje je trebalo odavno uvesti, na globalnom nivou i dalje ne postoje uporedivi statistički podaci o odraslima sa invaliditetom i realnostima njihove marginalizacije, pa čak i isključenosti iz zajednice celoživotnih učenika (npr. WHO, 2007; UNESCO, 2019). U ovoj komparativnoj analizi sledimo vodeće teorijske radove o intersekcionalnosti (Crenshaw, 1989) i ejblizmu (Campbell, 2009) i oslanjamo se na kategorije klase (Goldberg, 2018; Candeias, 2021) kada je reč o slučaju Nemačke i na kategorije kaste (Kothari et al., 2020; Yengde, 2022) kada je reč o slučaju Indije i njihove intersekcionalne efekte na invalidnost i celoživotno učenje te diskutujemo o posledicama koje osnažuju i opterećuju odrasle učenike.

Ključne reči: inkluzivno obrazovanje odraslih, Indija, Nemačka, kasta, klasa

5 Dr Silke Schreiber-Barsch je profesorka obrazovanja odraslih na Institutu za stručno i dalje obrazovanje Fakulteta za obrazovne nauke Univerziteta u Duisburgu-Esenu.

6 Kumar Gaurav, MA, istraživač i radi na Univerzitetu u Delhiju.

7 Lukas Eble, MA, istraživač asistent na Univerzitetu u Duisburgu-Esenu.

8 Ovaj rad su podržali ERASMUS+ Blended Intensive Program (BIP), Grant No. 2022-1-DE01-KA131-HED-000057161-1, i Human Dinamics Center (HDC) Fakulteta humanističkih nauka Univerziteta Julius-Maximilians u Vircburgu.

Andragoške studije, issn 0354–5415, broj 11, decembar 2023, str. 89–107
 Originalni naučni rad
UDK 001.891:[342.813:005.336.3-053.81-057.4
doi: 10.5937/AndStud2302089M

Aleksandra Mihajlović[1]
Faculty of Education in Jagodina, University of Kragujevac

Emina Kopas Vukašinović[2]
Faculty of Education in Jagodina, University of Kragujevac

Olivera Cekić Jovanović[3]
Faculty of Education in Jagodina, University of Kragujevac

Research Competences of Early-Career Researchers[4]

Abstract: Development of human resources and empowerment of young scientists is one of the basic measures for achieving Serbia's current strategic scientific and technological development goals. The aim of our research was to determine which scientific *production quality determinants (assumptions) of early-career researchers* can strengthen their scientific research capacities and thus increase their scientific research quality. The research was performed using a descriptive method. An e-questionnaire for early-career researchers was prepared (N = 423). The results confirm that early-career researchers assess their scientific research competence differently depending on the scientific field in which they work, or have done their PhD. There are obvious differences in their assessments depending on the length of their work experience. Such results indicate that institutions and individuals need to intensify professional support for early-career researchers.

Keywords: scientific research, early-career researchers (ECRs), researchers' competence, scientific production quality determinants.

---

[1] Aleksandra Mihajlović, PhD, is an Associate Professor at the Faculty of Education in Jagodina, University of Kragujevac, Serbia (aleksandra.mihajlovic@pefja.kg.ac.rs).

[2] Emina Kopas Vukašinović, PhD, is a Professor at the Faculty of Education in Jagodina, University of Kragujevac, Serbia (emina.kopas@pefja.kg.ac.rs).

[3] Olivera Cekić Jovanović, PhD, is an Associate Professor at the Faculty of Education in Jagodina, University of Kragujevac, Serbia (o.cekicjovanovic@gmail.com).

[4] This article is the result of the interinstitutional cooperation project "Professional Competencies of Scientific Research Youth in the System of University Education", carried out and financed by the University of Kragujevac, Faculty of Education, Jagodina (Republic of Serbia) and the University of Niš, Faculty of Education, Vranje (Republic of Serbia), in the 2021–2022 period. This research was funded by the Ministry of Science, Technological Development and Innovation (Contract No. 451-03–47/2023–01/ 200140). The study was approved by the University of Kragujevac Psychological Research Ethics Committee (Decision XX-6, December 20th, 2021). This research was funded by the Ministry of Education, Science and Technological Development of the Republic of Serbia (Contract No. 451-03–68/2022–14/ 200140).

Strategic Requirements for Early-Career Researchers

The changes that have taken place in higher education and scientific research in recent decades, as a result of the Bologna Process, and the implementation of the High Education Law (*Zakon o visokom obrazovanju*, 2017) and the Law on Science and Research (*Zakon o nauci i istraživanjima*, 2019) have aimed at improving the conditions for both studying and research in Serbia. In Europe and globally, the dominant idea is that research, development and innovation represent the key lever that has no alternative and is a quintessential factor for the development of a modern knowledge-based society. The prevailing understanding is that economic, and thus overall social development, is crucial and increasingly dependent on human capital, rather than natural resources. As Jenkins et al., (2003) emphasize, "The emerging 'knowledge economy' is one that requires individuals with creativity and ability to develop, find and synthesize new knowledge" (p. 24). Accordingly, the importance given to the quality of education, research and innovation has increased (Šipka, 2016). In 2007, the European Council determined that one of the priorities in the development of Europe was to strengthen investment in knowledge, i.e. to create better framework conditions for research, development and innovation. That same year, the European Commission implemented the idea of creating a single European Research Area (ERA), with the aim of defragmenting research capacities and making them more attractive for investment in research and development (Kronja et al., 2011). These measures were aimed at developing scientific research potential, bringing researchers from less developed countries closer to European higher education, as well as the integration of most scientists into the European research space. The sustainability of these ideas, among other things, can be achieved by intensive development of early-career researchers (hereinafter: ECRs), which in terms of higher education practice in the world, focuses on the human factor – professional development of ECRs, as it needs to provide highly qualified professionals capable of initiating creative and innovative changes in their professional field (Atamanova & Bogomaz, 2011; OECD, 2007).

Literature suggests that there are differences in defining *early-career* in research (Bazeley, 2003). An early-career researcher can be described as a "transition stage between PhD and senior academic position" (Christian et al., 2021, p. 1). The term early-career researcher is not necessarily associated with the age of the researcher/scientist since, in some disciplines, one might start a research career at an older age (Bazeley, 2003). Ocokoljić et al. (2015) point out that, in the Republic of Serbia, the term early-career researcher refers to: junior researchers and research assistants (Law on Science and Research, 2019) and teaching assistants and PhD students (High Education Law, 2017). In addition to them, we decided to include in the category of early-career researchers also assistant professors, a beginning-level university teaching position. We decided to set an additional age criterion – ECRs under 40, which is in line with university requirements for funding ECRs' projects (University of Kragujevac, 2022).

In light of the above considerations, the national Scientific and Technological Development Strategy sets out measures for preserving and strengthening the existing potentials for scientific research and innovation, in order to improve the quality and efficiency of science in the Republic of Serbia. The basis of this potential certainly comprises researchers and research teams, i.e. their scientific production. Early-career researchers are a resource of great importance for the dynamic further development of scientific research and innovation system, recognizable in the international framework (Strategy of Scientific and Technological Development for the 2021–2025 Period, 2021).

Responding to Challenges Met by Early-Career Researchers

The Republic of Serbia has launched several mechanisms to support ECRs, and in this context, early-career researchers have some, but still obviously insufficient (Valić Nedeljković & Kmezić, 2013), institutional and non-institutional support for development and implementation of their scientific research. The ECRs' scientific research is supported by various regulations, enactments, internal decisions and regulations of the line ministries, as well as by scholarship programs for research, stays and financing of scientific research projects within various programs and national and EU funds, etc. However, the research results show that ECRs, especially in social sciences, face many problems, e.g. lack of funds for empirical research and data collection, insufficient mentorship, excessive administrative work (Ocokoljić et al., 2015; Valić Nedeljković & Kmezić, 2013;), some of which are not even recognized in strategic documents. According to the research results, good mentoring, adequate consultations with more experienced colleagues and continuous career support can help ECRs to more successfully overcome challenges that are set before them (Machovcova et al., 2022).

Also, as regards the quality of the ECRs' scientific work, insufficient mastery of methodological disciplines necessary for theoretical and empirical research is one of the major problems faced by scientists in Serbia (Urošević & Pavlović, 2013). This primarily refers to insufficient knowledge of quantitative and qualitative approaches based on causal inference, mathematical modelling of social phenomena, etc., which is a consequence of weak requirements during studies (especially at the PhD level). This conclusion is supported by the results of a study conducted in 2018, the aim of which was to examine the quality of PhD studies at faculties in the field of social sciences and humanities in Serbia (Vušurović Lazarević et al., 2018). PhD students recognize methodology and research work as one of the weakest aspects of their studies and believe that this is one of the main reasons why the quality of their papers and research is not at the level of those of researchers from other countries. Basic criticisms of PhD study programs include objections that not enough time is devoted to acquiring appropriate methodological research knowledge and skills, developing a methodological framework for research, and learning about research techniques and data collection methods. Most PhD students, except those in psychology and sociology, point out that the study programs do not include content related to the application of quantitative research methods (use of software tools, data analysis, research presentations, etc.), and that they were forced to master them independently.

The Strategy of Scientific and Technological Development for the 2021–2025 Period (2021) provides an overview of the implementation of measures from the previous Strategy. As per strengthening scientific research of youth, it says that the measure concerning the involvement of early-career researchers in projects has been implemented, through calls by the Ministry of Education, Science and Technological Development and programs of the Science Fund of the Republic of Serbia. Improvement of the scientific research assessment system, ECR mobility, strengthening of cooperation with the diaspora and regional cooperation, strengthening of researchers' participation in European science and innovation programs have all been partially achieved. The Strategy also confirms that no measures had been taken to improve PhD studies programs, which included staff training, scholarships for young and talented people, procurement of scientific and professional literature, publication of scientific works (Strategy of Scientific and Technological Development for the 2021–2025 Period).

In addition to improving basic research quality and increasing funding for science, the 2021–2025 Strategy confirms the need to improve the status of human resources, especially of early-career researchers, in order to strengthen the scientific research system in the Republic of Serbia. This includes their education and training in scientific research, enhancing the quality of ECRs' scientific results and creating conditions for their participation in projects. Therefore, it is important to narrow down and examine the assumptions of ECRs' scientific production quality. These include the professional competence for better and more efficient scientific production (i.e. research competence): the ability to select reference literature and a meaningful theoretical approach to research a question or problem, clearly define the of research methodology, apply different research techniques and procedures, process statistical data and interpret and analyze research results. Also, the ECRs' professional competence for scientific research implies that they have basic knowledge of publishing process and rules for the preparation of scientific papers and their publication in journals or presentations at conferences, as well as that they have mastered various concepts of the review process. These determinants of scientific research quality can be considered basic and can be a significant starting point for its valorization. At the same time, these determinants also pose a challenge to researchers searching for answers to numerous research questions, such as the question of the ECRs' scientific production quality. The British system of scientific production assessment, the Research Assessment Exercise, has treated productivity (number of published papers) as the main measure of researchers' performance (Moed, 2008).

Scientific production and its quality have been in focus in recent decades, especially since electronic databases, open access electronic scientific journals, and a large number of publications and scientific reports have become widely available to researchers around the world. A number of authors (Moed, 2008; Šipka, 2016) often talk about the hyper production of scientific papers, bringing into question scientific research quality, their essential importance for the further development of science, as well as the validity of results published in scientific papers. Especially if we bear in mind a significant number of "predatory journals" for which profit is important, rather than the quality of scientific papers they publish (Brezgov, 2019; Djuric, 2015).

The results obtained by the analysis of online citation databases of peer-reviewed literature confirm that Serbia's scientific production really has increased in the past few years. However, according to the authors of the research, this increase may be disputed in absolute terms, since the increase in the Serbian production of scientific papers (for example in WoS) has been accompanied by a decrease in quality of the published scientific papers. It is evidenced by the results whose interpretation leads to a discrepancy between Serbian scientific productivity and citations in WoS, when both of these performance dimensions are observed in relation to other countries (Šipka, 2016). The analysis of the citation index of mentioned papers supports this claim, which, according to the research results, is low – below average in relation to Europe, which, on the one hand, may indicate that quality of the scientific papers in recent years is not a priority (Benčetić Klaić & Klaić, 2004; Ivanović & Ho, 2014). However, on the other hand, it may indicate that a large number of papers are published in a short period of time, wherefore authors/researchers do not have enough time to access all the available academic research databases on a particular topic, or to study them thoroughly and properly, that they thus lack timely and relevant citation, which certainly cannot be a measure of the quality of the published papers.

Methodology of Research

Research aim and objectives

The aim of this research was to determine, based on the respondents' self-assessment, which *determinants (assumptions) of ECRs' scientific production quality* can strengthen their scientific research capacities and thus improve their scientific research quality. Starting from this, the following research tasks were defined:

(1) determine the ECRs' ability to meaningfully and clearly *define their research methodology*;
(2) determine the ECRs' ability to *choose reference literature as a starting point for a quality theoretical approach to the research problem*;
(3) determine the level of the ECRs' ability *to apply different research techniques and procedures, and interpret and analyze the obtained research results*.

Also, we strongly believe that it is important to determine whether these scientific production quality assumptions are determined by the following independent variables: the educational and scientific field of the researchers and the length of their work experience.

Method

The presented study examines quantitative data, which represent a subset of a larger study of early-career researchers in the Republic of Serbia. A descriptive method and a content analysis procedure were applied. The ECRs' attitudes were examined by an instrument developed specifically for this research, within the inter-institutional scientific project, implemented by the Faculty of Education in Jagodina and the Faculty of Education in Vranje (Professional Competence of Scientific Research Youth in the System of University Education, 2021–2022).

Instrument

The instrument used was a questionnaire which consisted of two parts. The first part collected background information about the ECRs (years of work experience and PhD study program). The second part of the instrument contained the ECRs' Self-Perceived Research Competence Scale (SPRC). SPRC is a five-point

Likert-type scale containing 13 items (Table 1). It was developed by the team of researchers (including co-authors of this paper) to determine the ECRs' self-reported level of research competence. The participants were asked to self-assess their own research competence in relation to the three research domains.

Table 1. SPRC scale items

Subscale	Items Code	Items
RS1	C1	I can formulate appropriate and current topics for writing papers.
	C2	I can define relevant problem statements and research aims.
	C3	I can define research hypotheses.
RS2	C4	I use various academic research databases to find relevant papers.
	C5	I can write an adequate review of relevant research studies in the introductory part of the paper.
	C6	I adequately paraphrase the claims of other authors.
RS3	C7	I can apply different data collection techniques.
	C8	I can apply different statistical procedures for quantitative data processing.
	C9	I can interpret the results of different statistical procedures for quantitative data processing.
	C10	I can apply different approaches to qualitative data analysis.
	C11	I can interpret the results of different approaches to qualitative data analysis.
	C12	I apply argumentation skills when discussing research results.
	C13	I can deduce research results and their implications for scientific theory development.

The process of designing the instrument was conducted in two phases. In the first phase, 25 ECRs volunteers were asked to draw up a list of issues and challenges they were facing regarding their research competence. In the second phase, research items were constructed based on the first phase results and in accordance with some previous studies and literature (Rockinson-Szapkiw, 2018; Swank & Lambie, 2016; Urošević & Pavlović, 2013; Vušurović Lazarević et al., 2018). We identified three research competence domains: (a) literature search and writing the theoretical framework, (b) research design knowledge, and (c) application of various data collection and analysis procedures, and interpretation of research results. Familiarity with the topic and thinking about it both critically and theoretically are important features of research competence. Writing the theoretical framework is considered one of the most important aspects of the research process since it provides a grounding base for both a literature review and methods and analysis (Grant & Osanloo, 2014). The literature review process and ability to critically assess, integrate relevant literature and present it in a clear, concise and cohesive manner are important steps when conducting research (Rockinson-Szapkiw, 2018; Swank & Lambie, 2016). Research methodology knowledge and skills, which include methodological procedures (such as research design, data sampling and collection), data analysis and interpretation, are another crucial part of research competence (Swank & Lambie, 2016). For the purpose of our study, we divided research methodology knowledge and skills into two domains: thefirst regarded the ability to define the problem statement and research aim and to construct clear, concise research questions/hypothesis, while the second concerned the adequate use of quantitative and qualitative data collection and analysis procedures and the ability to interpret the research results.

Cronbach's alpha reliability coefficient of the SPRC indicated very good reliability (α=0.900). The maximum score was 60 and the lowest possible score was 12. The SPRC consisted of three subscales corresponding to three research competence domains: *Research design* (RS1), *Literature search/theoretical framework* (RS2) and *Data collection/analysis procedures and interpretation of research results* (RS3). Cronbach' alpha for subscales RS1 (α=0.814) and RS3 (α=0.861) indicate good reliability and acceptable reliability for subscale RS2 (α=0.684). Items C1, C2 and C3 assessed the ECRs' competence to meaningfully and clearly define the methodology of their research (Table 1). The competence to choose reference literature and prepare a quality theoretical approach to the research problem was assessed by items C4, C5 and C6. Items C7-C13 assessed the ECRs' competence to apply various research techniques and procedures, to interpret and analyze research results.

Analysis

The statistical analysis was conducted using SPSS for Windows, version 23.0. P values lower than 0.05 were considered statistically significant for statistical analysis. The normality of data was assessed via the Shapiro-Wilk test of normality. For the quantitative data analysis, descriptive statistics methods were used (frequency, percentage, mean, standard deviation, mean ranks), while the Kruskal-Wallis H test with Dunn post hoc was used for non-parametric variables. Before performing the Kruskal-Wallis test, the necessary assumptions, such as level of measurement, independence of observations and normality, were checked. Length of work experience and PhD study program were the independent variables in the data analysis.

Sample

The research was conducted during 2021 and 2022 and included a sample of 423 ECRs in the Republic of Serbia. The participants were invited by using the state universities' and institutes' email lists of the ECRs they employed. We also contacted vice-deans and heads of departments and asked them to forward the invitation to ECRs at their institutions (both to those employed and those not employed there).

As noted, the term early-career researcher in this study referred to: junior researchers, research assistants, teaching assistants, assistant professors and PhD students under 40. All ECRs were categorized by their PhD study program into four groups of educational-scientific fields: Social Studies & Humanities (SS&H), Natural Sciences & Mathematics (NS&M), Technical and Technological Sciences (TTS) and Medical Sciences (MS). This categorization was in compliance with the classification provided by the National Council for Higher Education (*Nacionalni savet za visoko obrazovanje*, 2017) in the Republic of Serbia. The sample structure with regard to PhD study programs is given in Table 2. In relation to the years of work experience (WE), all ECRs were categorized into four groups as shown in Table 2.

Table 2. Sample breakdown by length of WE and PhD study program

	Length of WE				PhD study program			
	1–5	6–10	11 +	unemployed	SS&H	NS&M	TTS	MS
f	187	138	66	32	220	91	79	33
%	44.2	32.6	15.6	7.6	52.0	21.5	18.7	7.8

Results and Discussion

Before we begin the interpretation of results regarding the levels of ECRs' research competence, for which the participants in our research conducted a self-assessment, we need to note that an individual's score on the SPRC scale (RC) represents the mean-item summated score of the individuals' responses. A mean-item summated score is calculated by dividing an individual's summated score by the number of items constituting the scale, which creates a mean-item score for each individual that falls within the range of the values for the response continuum options (Warmbroad, 2014).

Table 3. The level of self-reported research competence

Subscale	Items Code	M	SD
	C1	4.13	0.90
RS1	C2	4.17	0.81
	C3	4.14	0.86
	C4	4.53	0.72
RS2	C5	4.27	0.82
	C6	4.41	0.76
	C7	4.18	0.86
	C8	3.37	1.24
	C9	3.57	1.14
RS3	C10	3.61	1.07
	C11	3.66	1.04
	C12	4.16	0.86
	C13	3.85	0.97
RC		4.00	0.63

On the Likert average scale, [1.00–1.80) indicates a very low level, [1.80–2.60) indicates a low level, [2.60–3.40) indicates a moderate level, [3.40–4.20) indicates a high level, while [4.20–5.00] indicates a very high level of self-reported competence (Narli, 2010).

Results show that, in general, the ECRs' self-reported competence for scientific research indicates a high level *(M =4.00, SD = 0.63*). As for the subscales, ECRs reported a higher level of competence for RS2 (*M=4.40, SD=0.60*) than for RS1 (*M=4,15, SD=0.73*) and RS3 (*M=3.77, SD=0.76*).

As per individual items, the statistical parameter values (mean, standard deviation) indicate that ECRs reported a high level of research competence for all items except for item C8 (I can apply different statistical procedures for quantitative data processing), where they reported a moderate level (Table 3).

The Shapiro-Wilk test of normality revealed that the RC scores were not normally distributed across the groups, both in regard to the years of work experience and the PhD study program. Hence, we used Kruskal-Wallis test to examine the differences between groups of ECRs, and Dunn's multiple comparison test to identify which groups were different. The results demonstrated that there was a statistically significant difference in self-reported research competence in general (RC) depending on the years of work experience ($\chi 2 = 12.732, p = 0.005$). Early-career researchers working 6–10 years rate their competence higher than those working 1–5 years ($p = 0.003$). On the other hand, we found that there was no statistically significant difference in self-reported research competence in general (RC) depending on the PhD study program ($\chi 2 = 4.542, p = 0.209$).

ECRs' Competence to Meaningfully and Clearly Define the Research Methodology

The first research task was to determine the ECRs' ability to meaningfully and clearly define their research methodology and whether this scientific production quality assumption is determined by the researchers' educational-scientific field and length of work experience. The Kruskal-Wallis test was performed in order to examine if there was a statistically significant difference in levels of self-reported competence in RS1 between different groups regarding their years of work experience and PhD study program.

We determined that there was a statistically significant difference in the RS1 competence in general, both depending on the PhD study program and years of work experience (Table 4). In order to identify the difference among the groups, the Dunn test was performed to reveal in which groups a significant difference in the RS1 scores occurred. Early-career researchers, whose field of dissertation is the SS&H, assess their competence with a higher grade than those whose dissertation is in the field of NS&M (p = 0.000).

In regard to the years of work experience, ECRs who have been working 6–10 years report a higher level of competence than those who have been working 1–5 years (p=0.037).

Table 4. ECRs' competence to define the research methodology depending on their length of WE and PhD study program

			Kruskal-Wallis test	
		Mean Ranks	χ2	Sig.
PhD study program	SS&H	233.16	18.086	0.000
	NS&M	171.15		
	TTS	200.40		
	MS	211.38		
Length of WE	1 – 5	193.58	10.830	0.013
	6 – 10	230.48		
	11 +	234.76		
	unemployed	193.00		

The Kruskal-Wallis test was performed in order to examine whether there were any differences in individual items. The attitudes of ECRs in our sample confirm that some of the listed research competences are significantly determined by their length of work experience, as well as the educational-scientific field in which they have been working on their dissertation or in which they have a PhD. With regard to their ability to define problem statements and research aims (C2), we found a statistically significant difference in their attitudes in relation to their length of work experience ($\chi 2 = 13.415$, $p = 0.004$). Although ECRs working for 6 or more years assessed their ability to define research aims and objectives better, a post-hoc test using Dunn's test with Bonferroni correction showed no specific statistically significant differences between the groups when they were compared with each other.

As per the ability to define research hypotheses (C3), a statistically significant difference was found in the ECRs' attitudes about the mentioned ability ($\chi 2 = 8.657$, $p = 0.034$). Dunn's post hoc test showed that there is a statistically significant difference in favor of those who have been working 6–10 years ($p = 0.016$), but also in favor of those who have been working 11 or more years ($p = 0.022$) compared to those who have been working 1–5 years.

The second independent variable was the educational-scientific field in which the ECRs have been doing their PhD dissertation or have a PhD. The research results confirm that their ability to *formulate appropriate and current topics for writing papers* (C1) is determined by this variable ($\chi 2 = 25.228$, $p = 0.000$). There is a statistically significant difference in the ECRs' attitudes about the mentioned ability, between the fields of Social Studies & Humanities (SS&H) and Natural Sciences & Mathematics (NS&M). A statistically significant difference is evident, in favor of the SS&H field ($p = 0.000$). Interestingly, there is a statistically significant difference in attitudes about this ability between the ECRs in the Natural Sciences & Mathematics (NS&M) and Medical Sciences (MS) categories, at the level of $p = 0.004$ in favor of the MS.

The next ECRs' competence concerns their already mentioned ability to *define relevant problem statements and research aims* (C2). It was confirmed that there is a statistically significant difference ($\chi 2 = 13.074$, $p = 0.004$) between the SS&H field and the NS&M, in favor of the SS&H ($p = 0.002$).

Similar results were obtained with regard to the ECRs' ability to *define research hypotheses* (C3). We found that a statistically significant difference in the ERCs' attitudes in relation to the educational-scientific field ($\chi 2 = 8.738$, $p = 0.033$) between the SS&H and the NS&M categories ($p = 0.049$) in favor of the SS&H.

ECRs' Competence to Choose Reference Literature as a Starting Point for a Quality Theoretical Approach to the Research Problem

The second research task was to determine the ECRs' ability to *choose reference literature* as a starting point for a quality *theoretical approach to the research problem* and whether this scientific production quality assumption is determined by their educational-scientific field of research and length of work experience.

We determined that there was no statistically significant difference in the RS2 competence in general, both in relation to the PhD study program and years of work experience (Table 5).

Table 5. ERCs' competence to choose literature and prepare the theoretical framework depending on the length of WE and their PhD study program

			Kruskal-Wallis test	
		Mean Ranks	$\chi 2$	Sig.
PhD study program	SS&H	221.29	4.965	0.174
	NS&M	188.56		
	TTS	215.13		
	MS	207.21		
Length of WE	1 – 5	197.05	6.381	0.094
	6 – 10	227.08		
	11 +	227.07		
	unemployed	203.22		

With regard to the ECRs' ability to write an adequate review of relevant research studies in the part of the paper on the theoretical approach to the research problem (research question) (C5), our study confirmed that this ability is determined by the researchers' work experience (*$\chi 2$ = 7.886, p = 0.048*). The Dunn test was performed to identify the differences among the groups and reveal in which groups a significant difference occurred. The results show that the ECRs with longer work experience (6–10 years) have developed this competence better than those with less work experience (1–5 years), which is indicated by a statistically significant difference at the level of p = 0.047. We also found that the educational-scientific field in which an ECR is writing a PhD or has a PhD determines their ability (*$\chi 2$ = 15.785, p = 0.001*) to adequately paraphrase the claims of other authors (C6). There is a statistically significant difference between the SS&H category and the NS&M category (p = 0.009) in favor of the SS&H. A statistically significant difference was found between the categories SS&H and MS, in favor of the SS&H (p = 0.019).

ECRs' Competence to Apply Different Research Techniques and Procedures, and Interpret and Analyze the Research Results

The third research task was to determine the ways in which ECRs are trained to apply various research techniques and procedures and interpret and analyze the research results and whether these scientific production quality assumptions are determined by their educational-scientific field and work experience.

The Kruskal-Wallis test results pointed out that there was a statistically significant difference in RS3 competence in general, in relation to the length of work experience (Table 6). We performed the Dunn's post hoc test for pairwise differences. The results showed that ECRs who have been working for 6–10 years reported a higher level of competence than those who have been working for 1–5 years. There was no statistically significant difference with regard to the PhD study program, (Table 6).

Table 6. ECRs' competence to apply research procedures and interpret results depending on their length of WE and PhD study program

			Kruskal-Wallis test	
		Mean Ranks	$\chi 2$	Sig.
PhD study program	SS&H	213.33	5.288	0.152
	NS&M	211.60		
	TTS	226.75		
	MS	168.94		
Length of WE	1 – 5	192.61	11.884	0.008
	6 – 10	239.24		
	11 +	215.16		
	unemployed	201.30		

The attitudes of ECRs in our sample confirm that the *listed professional competences* (abilities) for scientific research are determined by the years of work experience, as well as the educational-scientific field in which they are working on their PhD or have a PhD. With regard to their ability to interpret the results of various statistical procedures for data processing (C9), the study showed a statistically significant difference ($\chi 2 = 12.134$, $p = 0.007$) between the category of ECRs with 1–5 years of WE and the category of ECRs who have been working 6–10 years ($p = 0.004$) in favor of those with longer service. Also, with regard to the ECRs' ability to apply different approaches to qualitative data analysis (C10), a statistically significant difference was found between these categories ($\chi 2 = 9.381$, $p = 0.025$), in favor of researchers with longer experience ($p = 0.022$). The ECRs' attitudes about their ability to interpret the results of different approaches to qualitative data analysis (C11) were determined by the length of their work experience ($\chi 2 = 11.348$, $p = 0.010$). There is a statistically significant difference between the above, in favor of those who have worked 6–10 years, compared to researchers who have worked 1–5 years ($p = 0.013$).

With regard to their ability to *apply different statistical procedures for quantitative data processing* (C8), we found a statistically significant difference ($\chi 2 = 8{,}858$, $p = 0.031$) in relation to the educational-scientific field in which the ECRs are writing their PhD or have a PhD. Dunn's post hoc test showed that there were no statistically significant differences between respondents in these educational-scientific fields. However, having in mind their ability to derive the implications of research results for scientific theory development (C13), the results confirm that there is a statistically significant difference ($\chi2 = 11,606, p = 0.009$) between the SS&H category and the MS category, in favor of the SS&H ($p = 0.002$).

Conclusion

The ECRs' scientific production, with regard to the quality of their research and presentation of results, is a significant assumption of their scientific research competence, which is determined by the national strategy on scientific and technological development.

Our goal within this research was to discover which determinants of the ECRs' scientific production quality can strengthen their scientific research capacities. These determinants include their ability to meaningfully and clearly define the research methodology, perform an informed selection of reference literature for a theoretical approach to the research problem, apply various research techniques and procedures, and interpret and analyze the research results. We also endeavored to determine whether these assumptions about the ECRs' scientific production quality are determined by the field of their research and length of work experience.

The presented results confirm that the ECRs in our sample, who have or are writing their PhD is in the field of social sciences and humanities, have a better assessment of their scientific research competence, than those whose dissertations are in the field of natural, mathematical and medical sciences. These competences refer to their ability to formulate appropriate and current topics for writing papers, to define the relevant problems, goals and research hypotheses, to adequately paraphrase the claims of other authors and to derive implications from the research results, important for further scientific theory development.

As we have assumed, in relation to the length of ECRs' work experience, those with longer work experience estimate that they have better developed scientific research competence. These are competences that entail their ability to define the relevant problems, goals and research hypotheses, write an adequate review of relevant research studies for the theoretical approach to the problem (research question), apply statistical procedures for quantitative data processing, apply different approaches to qualitative data analysis and interpret the results determined by such approaches. The fact that researchers with the shortest work experience assess their scientific research competence the most poorly may be related to insufficient attention to the acquisition of methodological research knowledge in PhD study programs, as indicated by Vušurović Lazarević et al. (2018).

We believe that such research results are a good starting point for further research, in order to identify the reasons behind significant differences in determining the ECRs' quality of competence in different scientific fields.

Furthermore, the presented results lead to the conclusion that more attention must be paid to the ECRs' scientific production issues, in terms of continuous support provided by the institutions and individuals, all with a view to increasing the quantity and quality of the ECRs' scientific results.

References

Atamanova, I., & Bogomaz, S. (2011). Language learning through content: What can help university students develop their communicative competence in a professional field? In B. Swaffield & I. Guske (Eds.), *Global encounters: Pedagogical paradigms and educational practices* (pp. 93–105). Cambridge Scholars Publishing.

Bazeley, P. (2003). Defining 'early career' in research. *Higher Education*, *45*, 257–279. https://doi.org/10.1023/A:1022698529612

Benčetić Klaić, Z., & Klaić, B. (2004). Croatian scientific publications in top journals according to the Science Citation Index for the 1980–2000 period. *Scientometrics*, *61*, 221–251.

Brezgov, S. (2019). *Beall's list of predatory publishers 2015.* Scholarly Open Access. Retrieved from https://scholarlyoa.com/publishers/

Christian, K., Johnstone, C., Larkins, J. A., Wright, W., & Doran, M. R. (2021). A survey of early-career researchers in Australia. *eLife*, *10*, Article e60613, Retrieved from https://doi.org/10.7554/elife.60613

Djuric, D. (2015). Penetrating the omerta of predatory publishing: The Romanian connection. *Science and Engineering Ethics*, *21*, 183–202. https://doi.org/10.1007/s11948–014–9521–4

Grant, C., & Osanloo, A. (2014). Understanding, selecting, and integrating a theoretical framework in dissertation research: creating the blueprint for your "house". *Administrative Issues Journal Education Practice and Research*, *4*(2), 12–26. https://doi.org/10.5929/2014.4.2.9

Ivanović, D., & Ho, Y. S. (2014). Independent publications from Serbia in the Science Citation Index Expanded: a bibliometric analysis. *Scientometrics*, *101*(1), 603–622. https://doi.org/10.1007/s11192–014–1396–2

Jenkins, A., Breen, R., Lindsay, R., & Brew, A. (2003). *Reshaping teaching in higher education: Linking teaching with research*. Routledge Limited.

Kronja, J., Avlijaš, S., Matejić, V., Todić, D., Kovačević, A., & Branković, J. (2011). *Vodič kroz Strategiju Evropa 2020*. Evropski pokret u Srbiji.

Machovcova, M., Mudrak, J., Cidlinska, K., & Zabrodska, K. (2022). Early career researchers as active followers: perceived demands of supervisory interventions in academic workplaces, *Higher Education Research & Development*, *41*(2), 423–436. https://doi.org/10.1080/07294360.2022.2040447

Moed, H. F. (2008). UK research assessment exercises: Informed judgments on research quality or quantity? *Scientometrics, 74*, 153–161. https://doi.org/10.1007/s11192–008–0108–1

Nacionalni savet za visoko obrazovanje. (2017). *Pravilnik o listi stručnih, akademskih i naučnih naziva*. Sl. glasnik RS, 114/2017. Retrieved from https://www.pravno-informacioni-sistem.rs/SlGlasnikPortal/eli/rep/sgrs/drugidrzavniorganiorganizacije/pravilnik/2017/53/1/reg

Narli, S. (2010). An alternative evaluation method for Likert type attitude scales: rough set data analysis. *Scientific Research Essays*, *5*(6), 519–528.

Ocokoljić, S., Kleut, J., & Radovanović, B. (2015). *Uslovi rada i status mladih istraživača na univerzitetima, institutima i u nevladinom sektoru*. Institut ekonomskih nauka.

OECD. (2007). *OECD thematic review of tertiary education. Country background report for the Russian Federation.* Retrieved from http://www.oecd.org/dataoecd/22/10/40111027.pdf

Rockinson-Szapkiw, A. (2018). The development and validation of the scholar–practitioner research development scale for students enrolled in professional doctoral programs. *Journal of Applied Research in Higher Education*, *10*(4), 478–492. https://doi.org/10.1108/JARHE-01–2018–0011

Strategija naučnog i tehnološkog razvoja Republike Srbije za period od 2021. do 2025. godine „Moć znanja“ [Strategy of Scientific and Technological Development for the 2021 – 2025 Period “The Power of Knowledge”] (2021). Sl. glasnik RS, 10/2021–3. Retrieved from http://www.pravno-informacioni-sistem.rs/SlGlasnikPortal/eli/rep/sgrs/vlada/strategija/2021/10/1/reg

Swank, J. M., & Lambie, G. W. (2016). Development of the Research Competencies Scale. *Measurement and Evaluation in Counseling and Development*, *49*(2), 91–108. https://doi.org/10.1177/0748175615625749

Šipka, P. (2016). Deset godina naglog rasta srpske naučne produkcije: Ali šta je sa njenim kvalitetom? In A. Kostić (Ed.), *Nauka: stanje, strategija, perspective* (pp. 33–62). SANU.

Univerzitet u Kragujevcu [University of Kragujevac]. (2022). Pravilnik o postupku izbora i finansiranja naučnoistraživačkih odnosno umetničkih projekata mladih istraživača i umetnika Univerziteta u Kragujevcu. Retrieved from https://www.kg.ac.rs/Docs/Pravilnik_o_izboru_i_finansiranju_projekata_mladih_istrazivaca_i_umetnika_062022.pdf

Urošević, B., & Pavlović, D. (2013). Istraživanja u društvenim naukama u Srbiji posle 1990. godine. *Političke perspektive*, *3*(2), 103–128.

Valić Nedeljković, D., & Kmezić, M. (2013). Položaj mladih istraživača u Srbiji 2012. In I. Stošić, B. Radovanović, & M. Đukić (Eds.), *Istraživanja u oblasti društvenih* *nauka u Srbiji: pregled stanja, karakteristični problemi i preporuke* (pp. 121–134). Institut ekonomskih nauka.

Vušurović Lazarević, A., Hrkalović, M., Vukov, T., & Živković, Ž. (2018). *Kvalitet doktorskih studija* u *oblasti društvenih* i *humanističkih nauka* u *Srbiji.* Grupa za analizu i kreiranje javnih poltika.

Warmbroad, J. R. (2014). Reporting and interpreting scores derived from Likert-type scales. *Journal of Agricultural Education*, *55*(5), 30–47. https://doi.org/10.5032/jae.2014.05030

Zakon o visokom obrazovanju. (2017). *Službeni glasnik RS*, 88/2017. Retrieved from https://www.paragraf.rs/propisi/zakon_o_visokom_obrazovanju.html

Zakon o nauci i istraživanjima. (2019). *Službeni glasnik RS*, 49/2019. Retrieved from https://www.pravno-informacioni-sistem.rs/SlGlasnikPortal/eli/rep/sgrs/skupstina/zakon/2019/49/1

Aleksandra Mihajlović[5]
Fakultet pedagoških nauka u Jagodini, Univerzitet u Kragujevcu

Emina Kopas Vukašinović[6]
Fakultet pedagoških nauka u Jagodini, Univerzitet u Kragujevcu

Olivera Cekić Jovanović[7]
Fakultet pedagoških nauka u Jagodini, Univerzitet u Kragujevcu

Istraživačke kompetencije istraživača na početku karijere[8]

Apstrakt: Razvoj ljudskih resursa i osnaživanje mladih naučnika jedna je od osnovnih mera za ostvarenje trenutnih strateških ciljeva Republike Srbije u oblasti nauke i tehnološkog razvoja. Naše istraživanje je imalo cilj da utvrdi koje *determinante (pretpostavke) kvaliteta naučne produkcije* mladih istraživača mogu da ojačaju njihove naučnoistraživačke kapacitete i tako unaprede kvalitet njihovih naučnih istraživanja. Ovo istraživanje je sprovedeno primenom deskriptivnog metoda. Pripremljen je e-upitnik za mlade istraživače (N = 423). Rezultati potvrđuju da mladi istraživači različito ocenjuju sopstvene naučnoistraživačke kompetencije zavisno od naučne oblasti u kojoj rade ili u kojoj su doktorirali ili će doktorirati. Utvrđene su i očigledne razlike u njihovim ocenama zavisno od dužine radnog iskustva. Ti rezultati ukazuju na to da institucije i pojedinci treba mladim istraživačima intenzivnije da pružaju profesionalnu podršku.

Ključne reči: naučna istraživanja, mladi istraživači, kompetencije istraživača, determinante kvaliteta naučne produkcije

[5] Dr Aleksandra Mihajlović je profesorka na Fakultetu pedagoških nauka u Jagodini Univerziteta u Kragujevcu (aleksandra.mihajlovic@pefja.kg.ac.rs).

[6] Dr Emina Kopas Vukašinović je profesorka na Fakultetu pedagoških nauka u Jagodini Univerziteta u Kragujevcu (emina.kopas@pefja.kg.ac.rs).

[7] Dr Olivera Cekić Jovanović je profesorka na Fakultetu pedagoških nauka u Jagodini Univerziteta u Kragujevcu (o.cekicjovanovic@gmail.com).

[8] Ovaj rad predstavlja rezultat interinstitucionalnog projekta „Profesionalne kompetencije naučnoistraživačkog podmlatka u sistemu univerzitetskog obrazovanja“, koji je 2021/2022. godine sproveo i finansirao Univerzitet u Kragujevcu, Fakultet pedagoških nauka u Jagodini (Republika Srbija), u saradnji sa Univerzitetom u Nišu i Pedagoškim fakultetom u Vranju (Republika Srbija). Studiju je odobrio Odbor za etiku psiholoških istraživanja Univerziteta u Kragujevcu (Odluka XX-6, usvojena 20. decembra 2021). Ovo istraživanje je finansiralo Ministarstvo prosvete, nauke i tehnološkog razvoja Republike Srbije (Ugovor br. 451-03–68/2022–14/200140).

Andragoške studije, issn 0354–5415, broj 11, decembar 2023, str. 109–132
© Institut za pedagogiju i andragogiju; Originalni naučni rad
UDK 374.7:[331.314:578.834
doi: 10.5937/AndStud2302109K

Edisa Kecap[1]
Filozofski fakultet, Univerzitet u Beogradu

Dubravka Mihajlović[2]
Filozofski fakultet, Univerzitet u Beogradu

Aleksandra Pejatović[3]
Filozofski fakultet, Univerzitet u Beogradu

Obrazovanje: put izvođenja iz senke nevidljivog i neplaćenog rada[4]

Apstrakt: Cilj ovog empirijskog istraživanja je da se ispita procena mogućnosti delovanja obrazovanja u prevazilaženju prakse „nevidljivog" i neplaćenog rada zaposlenih. Fenomen „nevidljivog" i neplaćenog rada analiziramo u dva konteksta, globalnom i radnom. U *globalnom* kontekstu, pod ovom pojavom podrazumevamo opšte stanje na tržištu rada gde su sve zastupljeniji nestandardni, fleksibilniji oblici radnog angažovanja, pojava neformalnog rada, kategorija „nevidljivih" i digitalnih radnika, fenomen modernog ropstva i fenomen prekarnog rada čije su glavne karakteristike nesiguran i neizvestan položaj privremenih radnika, ograničen pristup i neadekvatna pokrivenost sistemima pravne, socijalne i zdravstvene zaštite. U *radnom* kontekstu, pod „nevidljivim" i neplaćenim radom podrazumevamo svakodnevne radne zadatke i aktivnosti koje zaposleni obavljaju, a koji su „skriveni", prekovremeni, nepriznati i neplaćeni. Takvim stanjem posebno su pogođene određene kategorije zaposlenih. U tom kontekstu se objašnjava i prinudni rad kao deo modernog ropstva. Istraživanje smo realizovali na uzorku od 428 zaposlenih ispitanika na teritoriji Beograda u drugoj polovini 2020. i prvoj polovini 2021. godine, u vreme pandemije kovida 19. Kao instrument smo koristili upitnik sa skalama procene, koji su konstruisali istraživači. Rezultati istraživanja pružaju odgovor na nekoliko pitanja: u kojoj

[1] Dr Edisa Kecap je docentkinja i naučna saradnica na Filozofskom fakultetu Univerziteta u Beogradu (edisa.kecap@f.bg.ac.rs).

[2] Dr Dubravka Mihajlović je docentkinja i naučna saradnica na Filozofskom fakultetu Univerziteta u Beogradu (dunja_mihajlovic@yahoo.com).

[3] Dr Aleksandra Pejatović je redovna profesorka na Filozofskom fakultetu Univerziteta u Beogradu (apejatov@f.bg.ac.rs).

[4] Realizaciju ovog istraživanja finansijski je podržalo Ministarstvo nauke, tehnološkog razvoja i inovacija Republike Srbije u sklopu finansiranja naučnoistraživačkog rada na Univerzitetu u Beogradu – Filozofskom fakultetu (broj ugovora 451-03–47/2023–01/ 200163).

meri ispitanici procenjuju da obavljaju „nevidljiv“ i neplaćen rad; koje su, prema njihovoj proceni, mogućnosti delovanja obrazovanja na prevazilaženje prakse obavljanja te vrste rada; da li su, u odnosu na procenu stepena obavljanja „nevidljivog“ i neplaćenog rada, ispitanici učestvovali u obrazovnoj aktivnosti *Upoznavanje sa etičkim kodeksom organizacije i sankcijama u slučaju njegovog kršenja*. U kontekstu stalnog preispitivanja demokratičnosti u društvu, smatramo značajnim pitanje vidljivosti nezavidnog položaja i vrednosti određenih kategorija zaposlenih, koje poziva na odgovornost i aktivno angažovanje radnih organizacija, zakonodavstva i društva u celini. Za izlazak iz senke ovog značajnog pitanja, obrazovanje vidimo kao svetlo koje, za početak, može da ukaže na činjenice koje su do sada bile „nevidljive“ i osvetli i pokaže put ka rešavanju tog problema u budućnosti.

Ključne reči: nevidljiv i neplaćeni rad, prinudni rad, neformalni rad, obrazovanje odraslih, pandemija kovida 19

„Nevidljiv“ i neplaćeni rad – globalni kontekst

Pojavu nevidljivog i neplaćenog rada posmatramo u kontekstu promena na tržištu rada koje su nastale kao posledica globalizacije, razvoja tehnologije, digitalizacije i (ne)adekvatnih radnih uslova, prilika i mogućnosti ostvarivanja prava zaposlenih. Globalizacija i razvoj tehnologije su otvorili nove prilike i mogućnosti u svetu rada, ali i prostor za nesigurnosti, neizvesnosti, poteškoće i dileme. To za posledicu ima konstantnu potrebu prilagođavanja promenljivim uslovima rada zaposlenih, onih koji su u potrazi za poslom, država, vlada, institucija i različitih udruženja i organizacija.

Ova era promena, poznatija kao *digitalna revolucija*, značajno utiče na zapošljavanje i rad kroz „digitalizaciju, automatizaciju i platformizaciju“, menjajući način organizacije i obavljanja rada posredstvom digitalnih tehnologija (Eurofound prema: Baiocco *et al.*, 2022, str. 8).

Iako je standardni radni odnos i dalje dominantan, rad na neodređeno vreme sa punim radnim vremenom polako gubi svoju ulogu i ustupa mesto drugačijim formama radnog odnosa. Kao posledica globalnih tehnoloških promena u svetu rada, uočava se porast fleksibilnijih formi radnog angažovanja – nestandardnih radnih odnosa (eng. *non-standard employment* – NSE) (ILO, 2017). Uz te promene, radni ugovori neminovno menjaju svoju uobičajenu formu, često i izostaju. Tako imamo rad na određeno vreme, honorarni rad, odnosno angažovanje za privremene i povremene poslove, samozapošljavanje, projektne – „timske“ poslove, sezonski rad, rad sa skraćenim radnim vremenom, rad od kuće i drugo (ILO, 2017; Pejatović, 2019; World Bank, 2019). U skladu sa tim, karijere menjaju formu, postaju vrlo promenljive i fleksibilne. Tehnologija, putem promena koje izaziva, menja osećaj sigurnosti kod ljudi, utiče na promene mesta i načina rada, kao i uslova u kojima se rad obavlja. Još sedamdesetih godina XX veka pojavili su se termin i koncept *prekarni rad* (Pejatović, 2019), koji karakterišu ograničeno ili neizvesno trajanje ugovora, niske zarade, neadekvatna pokrivenost sistemima socijalne i zdravstvene zaštite, nemogućnost pridruživanja sindikatima, odsustva i korišćenja bolovanja (fenomen presenteizam).

Kada govorimo o „nevidljivom" i neplaćenom radu u globalnom kontekstu, imamo u vidu one zaposlene koji svoj posao obavljaju „iza ekrana", posredstvom platformi, na različitim lokacijama, od kuće, koji su u bilo kom smislu nevidljivi ili manje vidljivi za sistem, neprepoznati, neadekvatno plaćeni ili na bilo koji način finansijski nesigurni, socijalno i zdravstveno nezaštićeni, što rezultira malim ili nikakvim mogućnostima da ostvare svoja prava.

ILO (ILO, 2017, str. 18) pod *nevidljivim radnicima* podrazumeva one čije radno angažovanje nije prepoznato, koji se nalaze iza tehnologije i nisu ograničeni lokacijom, što se konkretno odnosi isključivo na *virtuelni* ili *digitalni rad*. Tako imamo pojmove: virtuelni iseljenik (eng. *virtual expatriate*) – zaposleni koji obavlja svoj posao uglavnom pomoću novih tehnologija, u drugoj zemlji gde putuje po potrebi; virtuelni tim (eng. *virtual team*) – članovi tima su udaljeni geografski i vremenski, potpuno oslonjeni na nove tehnologije; virtuelni radni aranžman (eng. *virtual work arrangement*) – radi se na daljinu, a uključuje i radne timove, ne ograničavaju ih lokacija, radni odnos i organizaciona struktura (Noe, 2010, str. 560).

Fenomen *gig ekonomije* (eng. *Gigeconomy*) (Anđelković *et al*., 2019, p. 4; World Bank, 2019) odnosi se na posao *digitalnih radnika* (eng. *digital workers*) koji pružaju svoje usluge (IT, unos podataka, marketing, pisanje, prevođenje, prodaja, profesionalne i konsultantske usluge – npr. advokatske ili finansijske, usluge iz kreativne i multimedijalne industrije) posredstvom digitalnih platformi u virtuelnom okruženju. Postoje dve vrste rada u gig ekonomiji: rad na zahtev posredstvom aplikacija (eng. *work on-demand via apps*) – posredstvom platforme se dešava samo proces ponude i potražnje, a proizvod i usluga se pružaju u realnom okruženju (npr. *Booking*); i masovni rad (eng. *crowdwork*) – u onlajn okruženju se dešava ceo proces pružanja usluge, od pretraživanja, ugovaranja do isporuke (npr. *Freelancer*), što će reći da su masovni rad i digitalni rad sinonimi (Anđelković *et al*., 2019; ILO, 2017).

Digitalni rad je doprineo da se postojeća neravnoteža između sigurnosti i fleksibilnosti produbi, što prati porast formi rada koje nisu tipične, kao što su privremeni rad, skraćeno radno vreme, rad na poziv, radni odnosi na više strana (eng. *multiparty employment relationships*), ugovori sa nultim radnim vremenom (eng. *zero-hours contracts*) i druge (ILO, Eurofound, prema: Anđelković *et al*., 2019; ILO, 2017).

Iako je digitalni rad, odnosno gig ekonomija (World Bank, 2019), sve zastupljenija kategorija, trenutno ne postoji mogućnost da se precizno procene razmere te pojave. Podaci su mahom nedostupni, nekompletni, samim tim i nepouzdani. Često izostaju sklapanje i potpisivanje bilo kakvih ugovora ili su radnici angažovani posredstvom nestandardnih formi ugovora, a u pojedinim zemljama ta kategorija radnika je pravno neregulisana te ne postoje ni baze podataka. Veoma su rasprostranjeni frilenseri. Frilensera je još 2010. godine bilo oko 84 miliona širom sveta, kojima često, uz osnovno zaposlenje, to predstavlja dodatni izvor prihoda (Donkin, 2010; World Bank, 2019).

Aktuelan je i termin *neformalni radnik* (eng. *informal worker*) (ILO, 2017; ILO, 2023; World Bank, 2019), koji se odnosi na radnike koji nisu obuhvaćeni zdravstvenim osiguranjem i socijalnom zaštitom, ne podležu zakonima i propisima o radnom vremenu ili minimalnoj zaradi. Oni čine oko 60% globalne radne snage, a procenat je i veći u zemljama u razvoju (ILO, 2023), često rade u tzv. sivoj zoni jer ne poseduju pisane ugovore, što otvara ozbiljno pitanje nezaposlenosti, neadekvatne situacije zaposlenosti i podzaposlenosti (ILO, 2017; Pejatović & Orlović Lovren, 2014), neformalnoj, skrivenoj zaposlenosti koja na najbolji način odslikava rad u digitalnoj sferi (Anđelković *et al.*, 2019).

Atipični radni odnosi, koji se povezuju sa većom nesigurnošću posla ali i prihoda, mogu da pogoršaju izglede za karijeru i zaradu (Baiocco *et al.*, 2022). U tom kontekstu, pitanje statusa radnika u mnogim slučajevima postaje veoma kompleksno i specifično. Postoje zavisni samostalni radnici (eng. *dependent self-employed workers*), a to su radnici koji su, u nekim slučajevima, angažovani po ugovoru kao samozaposleni i zapravo se nalaze u prikrivenom radnom odnosu. Prema Preporukama o radnim odnosima (Employment Relationship Recommendation, 2006, No. 198), to se dešava „kada poslodavac tretira pojedinca koji je zaposlen na način koji prikriva njegov ili njen pravi pravni status zaposlenog" (prema: ILO, 2021, str. 20). Postoje i nezavisni izvođači (eng. *independent contractors*), koji su često angažovani van zakonskih okvira koji bi trebalo da regulišu njihov radni odnos. Iako postoje napori da se kreira adekvatna vrsta radnog odnosa za tu kategoriju radnika, još uvek se nije našlo zadovoljavajuće rešenje (Royal Society prema: ILO, 2017).

Da bi se dostigla ravnoteža između posla i privatnog života, neophodno je da se uspostave prakse fleksibilnijeg radnog angažovanja (Robertson & Cooper, 2011). Jedan od načina je i rad na daljinu, odnosno IKT-mobilni rad (eng. *telework/ICT-mobile work*) koji predstavlja upotrebu „informaciono-komunikacionih tehnologija (IKT), kao što su pametni telefoni, tableti, laptop računari i/ili stoni računari, za posao koji se obavlja van prostorija poslodavca" (Eurofound & ILO, 2017, str. 3). Za rad na daljinu se koriste različiti termini, tako se termin *telework* koristi u Evropi, a *telecommuting* u Americi, Japanu, Indiji. Aktuelan je i termin rad na daljinu od kuće (eng. *home-based telework*) (Eurofound & ILO, 2017, str. 5). Kada govorimo o radu na daljinu, treba napraviti razliku između rada uz pomoć IKT od kuće i rada uz pomoć IKT van prostorija poslodavca.

Prema procenama ILO, u svetu je 2019. bilo oko 260 miliona onih koji su radili na daljinu od kuće (eng. *homeworkers*), što predstavlja 7,9% globalne zaposlenosti (ILO, 2021, str. 40). Skoro svi, 90% njih, radili su neformalno u zemljama sa niskim i srednjim prihodima (ILO, 2021).

Imajući u vidu kompleksnost pravnog i često nevidljivog statusa i prepoznatljivosti radnika, otvaraju se pitanja: koji je najbolji model za određivanje njihovog statusa kako bi mogli da ostvare svoja prava, pitanje socijalne i zdravstvene zaštite, ostvarivanje prava na penziju i drugo. Jedan od predloga Svetske banke (World Bank, 2019, str. 4) jeste model društvenog minimuma koji obuhvata obavezno ali i dobrovoljno socijalno osiguranje, nezavisno od statusa zaposlenja. Međutim, ni taj model nije adekvatan i sveobuhvatan jer ne obuhvata sve elemente i aspekte savremenih, kompleksnih radnih odnosa. Čak i u ekonomski stabilnim zemljama sa razvijenim sistemima socijalne zaštite nisu pronađeni idealni i sveobuhvatni modeli koji bi se odnosili na sve radnike ili situacije.

Ekonomski šok, migrantska kriza i pandemija kovida 19 (COVID-19) dodatno su pogoršali već težak položaj najugroženijih i najnezaštićenijih segmenata društva, radna mesta su uništena, a siromaštvo je poraslo. Globalne procene za 2021. godinu pokazuju poražavajuću statistiku – 50 miliona ljudi je svakodnevno u *modernom ropstvu*, odnosno prinudnom radu ili prinudnom braku, što predstavlja suprotnost bilo kakvoj socijalnoj pravdi (ILO, 2022).

„Nevidljiv" i neplaćen rad – radni kontekst

„Nemam legalnu radnu dozvolu, pa mogu da kažu policiji." –
26-ogodišnja žena koja radi u uslugama smeštaja i ishrane
ILO, 2022, str. 30

U kontekstu globalnih promena i tehnološkog i digitalnog napretka, bilo je reči o izazovima pravne i socijlne vidljivosti radnika. Međutim, postoji i druga strana nevidljivog rada, rad koji radnici svakodnevno obavljaju, koji nije u opisu posla, koji se „podrazumeva" i, uslovno rečeno, predstavlja kriterijum ili standard da zadrže svoj posao. Dodatni fizički ili psihološki napor koji radnici ulažu pravno je nevidljiv, ne nalazi se u ugovoru, predstavlja očekivanja nadređenog, prećutni je uslov da se posao zadrži i nije (dodatno) plaćen. Takvo ponašanje i atmosfera deo su organizacione kulture i klime jedne organizacije u kojoj su zanemarena ljudska prava, a deklarisane i stvarne vrednosti se ne podudaraju.

Pojavu nevidljivog i neplaćenog rada možemo da dovedemo u vezu i sa postojanjem tzv. *toksičnih organizacija* (Walton, 2008), koje, između ostalog, karakterišu destruktivno i eksploatatorsko ponašanje, manipulacija, zloupotreba moći lidera, nametanje nerealnog obima posla i drugo. Salin (prema: Čizmić & Vukelić, 2010), osim širih vidova organizacione kulture i klime, kao odgovorne za maltretiranje, navodi negativne oblike liderstva i *neadekvatan dizajn radnog mesta* iz kojeg proizilaze dvostruke uloge i nejasno definisani ciljevi određene pozicije. Kada radno mesto nije adekvatno osmišljeno i dizajnirano, a organizaciona kultura i klima su nepodržavajuće, stvara se pogodno okruženje za uspostavljanje neadekvatnih i neetičkih radnih praksi i očekivanja od zaposlenog. U svakom segmentu posla stvara se prostor za remećenje i (prećutnu) disproporciju prirode nečijeg posla, što podrazumeva sadržaj posla, radno opterećenje i tempo rada, radno vreme, participaciju i kontrolu, platu, ulogu u organizaciji, interpersonalne odnose, pristup kuća–posao (Leka & Griffiths, 2004). Radno opterećenje i tempo rada se odnose na količinu posla i rokove. Mnogi su primorani da preuzmu više radnih zadataka i obaveza kako bi sačuvali svoje karijere i zadržali trenutni položaj, a kada režim „preživljavanja bez napredovanja“ traje predugo, dolazi do sagorevanja (McClatchy, 2014, str. 28). Prekovremeno, nepredvidljivo radno vreme ugrožava bezbednost i zdravlje radnika, balans posao–život i doprinosi nesigurnosti zarade (ILO, 2023). Radnici, nastojeći da ispune sva očekivanja, rade više poslova istovremeno i često su u situaciji da pribegavaju odugovlačenju određenih obaveza, odnosno prokrastinaciji koja predstavlja „način na koji koristimo strah da uradimo nešto što ne želimo“ (McClatchy, 2014, str. 67), što obezbeđuje brzinu i fokus za obavljanje zadataka, ali i povećava stres, smanjuje kontrolu nad situacijom i snižava kvalitet obavljanja (McClatchy, 2014). Kada rad nije adekvatno organizovan, radni zadaci i ograničenja u ponašanju nisu jasno definisani, otvara se prostor za iskorišćavanje situacije (EU-OSHA, 2010).

Miler (Miller prema: Landy & Conte, 2013) smatra da centralni koncept pravde podrazumeva vrednovanje učinka, napredovanje i karijerni razvoj. To su situacije koje čoveku potvrđuju ubeđenja da (ni)su vredni. Na zadovoljstvo poslom utiče upravo adekvatna i pravična naknada za rad, zdravo i sigurno radno okruženje, prilika za razvijanje i primenu znanja i veština, kao i mogućnosti za razvoj karijere (Rosas & Corbanese, 2006).

Kada govorimo o nevidljivom i neplaćenom radu na nivou posla, nezaobilazna je tema tzv. *emocionalnog rada* (Finneman, 2003), koji može da izazove ozbiljnu psihološku štetu radniku, te ga treba umanjiti ili osmisliti drugačije.

Takav rad zaslužuje „posebnu naknadu ili nagradu“ (Finneman, 2003, str. 37). Ovde se otvara pitanje eksploatacije radnika i etike jer organizacija kao sredstvo za postizanje svojih ciljeva koristi nečije emocije i upravlja njima. Emocionalni rad ima različit intenzitet u različitim poslovima, tako da „kada je emocionalni rad toliko ekstreman da medicinska sestra, doktor ili socijalni radnik pregore, tada bismo s pravom pre mogli da preispitamo prirodu posla nego osobu koja obavlja posao“ (Finneman, 2003, str. 42).

Takve situacije utiču na povećan stres na radu, odnosno izazivaju stanje „povećanog radnog naprezanja izazvano prekomernim radnim opterećenjem koje se odnosi na rizične uslove radne sredine i povećane zahteve posla...“ (Čabarkapa, 2017, str. 27). Dalje se javlja sagorevanje, odnosno stanje totalne iscrpljenosti kada više nemate šta da pružite, a krajnja posledica je sindrom *karoshi* (Kecap, 2012; McClatchy, 2014), odnosno „ekstremno negativan stres i izgaranje na poslu koji uzrokuju iznenadnu smrt, a povezuje se s prekomernim radom, komplikovanim i previsokim zahtevima koji se postavljaju radniku i s izostankom adekvatne socijalne podrške, što se često dovodi i u vezu sa sindromom mobinga“ (Čabarkapa, 2017, str. 179). Centralni aspekt mobinga je disbalans moći između počinioca i žrtve, što će reći da je za njegovu pojavu odgovoran nadređeni (Duffy & Sperry, 2014; Einarsen & Hoel, 2008; Kecap & Mihajlović, 2018).

Kada govorimo o diskriminaciji, poznat je koncept *ejdžizma* (eng. *ageism*) (Čabarkapa, 2017), koji predstavlja diskriminaciju na osnovu starosne dobi pojedinaca, odnosno sistemsko diskriminisanje starijih osoba tako što im je otežan pristup tržištu rada, dok mlađi rade u nepovoljnim radnim uslovima sa volonterskim ugovorima ili ugovorima o radu, umesto ugovora za stalno (López López, 2021). Takođe, u svetu rada još uvek postoji rodna nejednakost, iako jeste došlo do znatnih pomaka (World Bank, 2019).

Stažiranje ili *pripravnički staž* (eng. *Internship or Traineeship*) još je jedno značajno pitanje kada govorimo o nevidljivom i neplaćenom radu. Postoje različite manje ili više strukturirane prakse koje nekad podrazumevaju plaćeno zaposlenje (finansijska nadoknada u vidu plate ili stipendije) ili neplaćeno obučavanje, odnosno radno iskustvo. Vrednost neplaćenog stažiranja je bogaćenje radne biografije, sticanje kontakata, znanja i veština (Stewart *et al.*, 2021), učenje koje je integrisano u rad, praksu (radno iskustvo pod nadzorom), volontersko iskustvo, neplaćeni probni rad (Blackham, 2021). Međutim, postoji opasnost da neplaćeno ili slabo plaćeno stažiranje ugrozi plaćeno zaposlenje i potkopa radne standarde, te bi stažiste mogli da tretiraju kao „bezizgledan jeftin rad...“ (Stewart, 2021, str. 32). ILO je prepoznala značaj stažiranja da se dođe do pristojnog posla, ali i rizik da se stažisti/pripravnici iskorišćavaju kao jeftina radna snaga koja zamenjuje radnike.

Takođe, radnici koji rade od kuće se u svakodnevnom radu suočavaju sa različitim problemima, posao im je nesiguran, samim tim i prihodi, zbog nepredvidljivog rasporeda i produžene dostupnosti na mreži postoje teškoće da se uskladi poslovni i privatni život (Baiocco *et al.*, 2022).

U kontekstu nevidljivog i neplaćenog rada, pažnju veoma privlači *koncept savremenog ropstva* (eng. *Modern slavery*), koji obuhvata dve komponente, a to su *prinudni rad* (eng. *forced labour*) i prinudni brak. U oba slučaja govorimo o situacijama eksploatacije koje osoba ne može da odbije niti napusti „zbog pretnji, nasilja, prinude, obmane ili zloupotrebe moći..." (ILO, 2022, str. 19). Situacija se pogoršala i ukazuje na porast broja ljudi u modernom ropstvu pojavom pandemije kovida 19 (ILO, 2022). Za potrebe našeg rada, fokusiraćemo se na komponentu *prinudni rad* pod kojim Konvencija o prinudnom radu ILO podrazumeva „sav rad ili uslugu koja se traži od bilo koje osobe pod pretnjom bilo kakve kazne i za koju se navedena osoba nije dobrovoljno ponudila" (ILO, 2022, str. 22). Prema Globalnoj proceni, 27,6 miliona ljudi se 2021. godine svakog dana nalazilo u situacijama prisilnog rada, što je čak 3,5 ljudi na hiljadu u svetu, u svim regionima, što uključuje i žene, migrante, decu. Prinudni rad se većinom dešava u sektorima privatne privrede (87%), najviše u sektoru usluga (trgovina, transport, ugostiteljstvo, netržišne socijalne usluge i drugo), proizvodnje, građevinarstva (većinom muškarci, veliki broj migranata), poljoprivrede i kućnih poslova (većinom žene), rudari, ribari. Da bismo rad smatrali prinudnim, međunarodni standardi rada propisuju da treba da budu ispunjena dva povezana uslova: (1) nedobrovoljnost – kada preuzimanje posla ili prihvatanje uslova rada nije slobodno i informisano, (2) primena kazne ili pretnja kaznom kako bi se pojedinac primorao na rad ili da se njegov odlazak spreči. Migranti su bili posebno pogodna grupa za trgovinu ljudima i prinudni rad, kao i zdravstveni radnici, radnici u higijeni, žene i deca. Tokom pandemije povećan je broj žrtava fizičkog i seksualnog nasilja nad ženama, što je uticalo na povećan rizik od trgovine ljudima (ILO, 2022).

Prema Globalnoj proceni 2021. (The 2021 Global Estimates prema: ILO, 2022), kada nedostaje slobodan i informisan pristanak, radnici se suočavaju sa uslovima rada koji se razlikuju od onih koji su dogovoreni na početku, pre zaposlenja – često rade prekovremeno; obavljaju drugačije poslove od onih koji su dogovoreni; rade za drugog poslodavca, ne za ugovorenog; plate su niže ili izostaju; uslovi rada su loši ili opasni; ne mogu da promene poslodavca zbog duga ili je posao uslov za stanovanje; 1% slučajeva se odnosi na situacije tradicionalnog ropstva. Postoje različiti načini i vrste prinude kao što su: sistematsko i namerno zadržavanje plata; prinuda na osnovu zloupotrebe ugroženosti pod pretnjom otkazom; zbog izricanja novčane kazne za odlazak pre dogovorenog datuma; manipulacija dugom; korišćenje izolacije – prekidanje kontakta sa porodicom i mogućim izvorima pomoći; oduzimanje ličnih dokumenata; pretnja da će biti prijavljeni vlastima ili deportovani; seksualno i fizičko nasilje, prisilno zatvaranje i uskraćivanje hrane, pića ili sna kao ekstremniji oblici prinude.

Osim adresiranja aktuelnih pitanja u vezi sa prinudnim radom, naročito njegovim intenziviranjem tokom pandemije kovida 19, otvoreno je i pitanje *ključnih radnika* (eng. *key workers*), koji su bili na udaru pandemije. Izrazi neophodni radnici (eng. *essential workers*), radnici prve linije (eng. *frontline workers*) i ključni radnici najčešće su se koristili da označe radnike koji su smatrani vitalnim za funkcionisanje ekonomije i društva. Koncept neophodnog rada (eng. *essential work*), poznat iz vremena krize (kuga i ratovi), označava rad, nekad i prinudni, kako bi se obavili neophodni zadaci u takvim okolnostima. Termin se pravno koristi u mnogim zemljama da zakonski ograniči pravo na štrajk radnika koji obavljaju neophodni rad (ILO, 2023) ako bi prekid službe „mogao da ugrozi život, ličnu bezbednost ili zdravlje celog ili dela stanovništva" (Komitet MOR-a za slobodu udruživanja prema: ILO, 2023, str. 10). Ključni radnici su se suočavali sa socijalnom izolacijom i razdvojenošću od svoje porodice; ograničenom društvenom interakcijom; rizikom po bezbednost i strahom od zaraze; negativnim zdravstvenim posledicama previsokih radnih zahteva; prekomernom smrtnošću od zaraze; pojačanim radnim intenzitetom, pružanjem dodatne mentalne i fizičke energije; ograničenom autonomijom; negativnim društvenim okruženjem; manjkom osoblja zbog zaraze i njenih posledica; reorganizacijom rada; finansijskim stresom; nedostatkom podrške sindikata i socijalne zaštite; povećanim nivoom anksioznosti, depresije i sagorevanja. U ovakvim prilikama, dodatno se istakla potcenjenost ključnih radnika, niske plate; postao je vidljiv jaz između njihove vrednosti za društvo i teških uslova u kojima rade (ILO, 2023). Zbog njihove specifične uloge i značaja za društvo u datom momentu, posao je bio ispred privatnog života.

Potaknuti takvim stanjem i dešavanjima na tržištu rada tokom pandemije, mi smo, našim istraživanjem, želeli da saznamo u kojoj meri zaposleni u Beogradu procenjuju da obavljaju nevidljiv i neplaćen rad, u kojoj meri vide mogućnosti delovanja obrazovanja na prevazilaženje situacija obavljanja ove vrste rada.

Metodološki okvir istraživanja

Cilj ovog empirijskog istraživanja je ispitivanje procene mogućnosti delovanja obrazovanja na prevazilaženje situacija obavljanja „nevidljivog" i neplaćenog rada.

Istraživačka pitanja na koja želimo da dobijemo odgovor su sledeća:

(1) u kojoj meri ispitanici procenjuju da obavljaju „nevidljiv" i neplaćen rad u odnosu na pol, nivo obrazovanja i veličinu organizacije u kojoj rade;

(2) koje su, prema njihovoj proceni, mogućnosti delovanja obrazovanja na prevazilaženje prakse obavljanja te vrste rada i
(3) da li su, u odnosu na procenu stepena obavljanja „nevidljivog" i neplaćenog rada, ispitanici učestvovali u obrazovnoj aktivnosti *Upoznavanje sa etičkim kodeksom organizacije i sankcijama u slučaju njegovog kršenja*.

Istraživanje je kvantitativno, empirijskog karaktera, i korišćena je deskriptivna (neeksperimentalna) metoda. Istraživačke tehnike su anketiranje i skaliranje. Kao instrument korišćen je upitnik sa skalama procene konstruisan od istraživača. Za prikaz rezultata istraživanja korišćeni su: deskriptivna statistika (frekvencije i procenti), vrednosti hi-kvadrata (test za proveru povezanosti kategoričkih varijabli) i Kramerov V. Istraživanje je realizovano u Srbiji, na teritoriji Beograda, na uzorku od 428 zaposlenih ispitanika, u drugoj polovini 2020. i prvoj polovini 2021. godine, u vreme pandemije kovida 19.

Prikaz i interpretacija rezultata istraživanja

Procena stepena obavljanja „nevidljivog" i neplaćenog rada

Prvo istraživačko pitanje se odnosi na procenu stepena obavljanja nevidljivog i neplaćenog rada u odnosu na pol, nivo obrazovanja i veličinu organizacije u kojoj su ispitanici zaposleni. U tabeli 1 dati su rezultati koji se odnose na pol ispitanika.

Tabela 1. Procena stepena obavljanja „nevidljivog" i neplaćenog rada u odnosu na pol ispitanika

„Nevidljiv" i neplaćeni rad – procena stepena obavljanja	Pol		N	
	Muški	Ženski	F	%
Nimalo ili u maloj meri	66	101	167	39
Osrednje	40	53	93	21,7
U velikoj meri ili u potpunosti	54	114	168	39,3
Ukupno	160	268	428	
	37,4%	62,6%	100,0%	
Vrednost $\chi 2$, p, V, df	$\chi 2$ = 19,825; p = 0,001; V = 0,215; df = 4			

Među ispitanicima prednjače žene. Nalazi po polovima pokazuju da žene u nešto većoj meri procenjuju da obavljaju nevidljiv i neplaćeni rad. Posmatrano ukupno, gotovo isti broj ispitanika se nalazi na dva kontinuuma skale i procenjuje da *nimalo ili u maloj meri* ili *u velikoj meri ili u potpunosti* obavljaju nevidljive i neplaćene poslove. Međutim, kada tom broju dodamo i procenu *osrednje*, dolazimo do zaključka da nešto više od 60% ispitanika obavlja takvu vrstu poslova.

Nalazi su statistički značajni, Kramerov V iznosi 0,215, što predstavlja srednju veličinu efekta povezanosti između varijabli. Takvi nalazi su u saglasnosti sa stanjem na tržištu rada, imajući u vidu opisanu situaciju u oba konteksta koje smo predstavili u teorijskom delu rada. Činjenica je da u svetu rada postoje znatni pomaci, ali još uvek postoji rodna nejednakost (World Bank, 2019).

U tabeli 2 su predstavljeni rezultati procene stepena obavljanja „nevidljivog“ i neplaćenog rada u odnosu na nivo obrazovanja ispitanika.

Tabela 2. Procena stepena obavljanja „nevidljivog“ i neplaćenog rada u odnosu na nivo obrazovanja ispitanika

„Nevidljiv” i neplaćeni rad – procena stepena obavljanja	Nivo obrazovanja								N	
	Nepotpuna osnovna škola	Osnovna škola	Trogodišnja srednja škola	Četvorogodišnja srednja škola (gimnazija, srednja stručna škola)	Viša škola ili visoka strukovna škola	Fakultet/osnovne studije	Master ili specijalističke studije	Doktorske studije	f	%
Nimalo ili u maloj meri	7	4	11	39	14	42	37	13	167	39,0
Osrednje	0	7	9	12	7	34	16	8	93	21,7
U velikoj meri ili u potpunosti	16	9	12	39	19	38	23	12	168	39,3
Ukupno (f)	23	20	32	90	40	114	76	33	428	100
Ukupno (%)	5,4%	4,7%	7,5%	21,0%	9,3%	26,6%	17,8%	7,7%	100,0%	
Vrednost $\chi 2$, p, V, df	$\chi 2$ 45,042; p = 0,022; V = 0,162; df = 28									

Prema podacima iz tabele 3, uviđamo da oni sa najnižim nivoom obrazovanja u većoj meri procenjuju da obavljaju posao koji se ne vidi i nije dovoljno plaćen, što možemo da dovedemo u vezu sa generalno slabijim položajem manje obrazovanih, njihovim nerazumevanjem prava i nedostatkom informacija, znanja i veština da se sa takvom situacijom izbore. Poznato je da se obrazovaniji uspešnije i brže prilagođavaju, karijerno su rezilijentniji, odnosno bolje se nose sa nepovoljnim i neočekivanim situacijama u svom radu (Noe, 2010). Međutim, uzorak kategorije nezavršena i završena osnovna škola nije dovoljan kako bismo izneli bilo kakve zaključke u tom pravcu. Kategorije trogodišnja i četvorogodišnja srednja škola, viša škola i doktorske studije imaju iste ili približne odgovore *nimalo ili u maloj meri* ili *u velikoj meri ili u potpunosti*, dok je broj ispitanika koji su završili master i specijalističke studije iz kategorije *nimalo ili u maloj meri* nešto veći, što možemo da pripišemo činjenici da mahom oni koji su već u radnom odnosu upisuju tu vrstu studija zbog konkretnih potreba posla, radnog mesta ili povećanja plate, te je možda iz tog razloga situacija nešto jasnija. Međutim, ako odgovorima pridružimo odgovore iz kategorije *osrednje*, procenat onih koji uglavnom obavljaju nevidljiv i neplaćen rad ipak nije zanemarljiv. Nalazi jesu statistički značajni, međutim veličina efekta (V = 0,162) govori u prilog slabe povezanosti.

Tabela 3 predstavlja rezultate istraživanja u odnosu na veličinu organizacije u kojoj su ispitanici radno angažovani.

Tabela 3. Procena stepena obavljanja „nevidljivog" i neplaćenog rada u odnosu na veličinu organizacije u kojoj su ispitanici zaposleni

„Nevidljiv" i neplaćeni rad – procena stepena obavljanja	Veličina organizacije				N	
	Do 10 zaposlenih (mikro pravno lice)	Od 11 do 50 zaposlenih (malo pravno lice)	Od 51 do 250 zaposlenih (srednje pravno lice)	Preko 250 zaposlenih (veliko pravno lice)	f	%
Nimalo ili u maloj meri	36	27	38	66	167	39,0
Osrednje	9	19	25	40	93	21,7
U velikoj meri ili u potpunosti	46	40	30	52	168	100,0
Ukupno (f)	91	86	93	158	428	
Ukupno (%)	21,3%	20,1%	21,7%	36,9%	100,0%	
Vrednost χ2, p, V, df	χ2 = 24,308; p = 0,018; V = 0,138; df = 12					

Iz prikazane tabele uočavamo da ispitanici iz manjih radnih organizacija (mikro i malo pravno lice) u nešto većem broju procenjuju da obavljaju nevidljiv i neplaćen rad *u velikoj meri ili u potpunosti*, dok ispitanici iz većih radnih organizacija (srednje i veliko pravno lice) više procenjuju da nisu *nimalo* ili su *u maloj meri* izloženi takvoj vrsti dodatnog rada. I ti nalazi su statistički značajni, međutim, kao i u prethodnoj tabeli, vrednost veličine efekta povezanosti (V = 0,138) je niska. Budući da je u manjim organizacijama manje zaposlenih, pretpostavljamo da se od njih i očekuje da obavljaju više poslova jer podela radnih zadataka nije isključiva i striktna, veoma je fluidna i zavisi od date situacije. Obično jedna osoba ima više zaduženja, pokriva više radnih uloga i zadataka koji se obavljaju u skladu sa potrebama, procesi i procedure rada su nešto fleksibilnije, što može biti prednost zbog mogućnosti brzog prilagođavanja i rešavanja problema, ali i prostor za stres i sagorevanje zbog nejasnih uloga i neizvesne svakodnevnice.

U većim organizacijama i sistemima uloge i zaduženja su jasnije, zavise od sektora ili pozicije na kojoj se zaposleni nalazi, opisi radnog mesta su konkretniji, podeljeni prema delokrugu, uglavnom je jasan put obraćanja i redosleda obavljanja radnih zadataka, striktniji su procesi i procedure rada. Imajući to u vidu, svaki zaposleni ima i određeni stepen autonomije u okviru svoje nadležnosti.

Mogućnosti delovanja obrazovanja u prevazilaženju prakse „nevidljivog“ i neplaćenog rada

Da bismo odgovorili na drugo istraživačko pitanje i uvideli koliku moć ispitanici pridaju obrazovanju kako bi se prevazišle situacije i praksa „nevidljivog“ i neplaćenog rada, predstavljamo, pre svega, rezultate te procene u odnosu na nivo obrazovanja ispitanika (tabela 4).

Tabela 4. Procena stepena mogućnosti delovanja obrazovanja u prevazilaženju prakse „nevidljivog“ i neplaćenog rada u odnosu na nivo obrazovanja ispitanika

Mogućnosti delovanja obrazovanja u prevazilaženju prakse „nevidljivog“ i neplaćenog rada	Nivo obrazovanja								N	
	Nepotpuna osnovna škola	Osnovna škola	Trogodišnja srednja škola	Četvorogodišnja srednja škola (gimnazija, srednja stručna škola)	Viša škola ili visoka strukovna škola	Fakultet/osnovne studije	Master ili specijalističke studije	Doktorske studije	f	%
Nimalo ili u maloj meri	6	4	17	46	25	53	42	20	213	49,8
Osrednje	5	9	8	22	6	29	22	5	106	24,8
U velikoj meri ili u potpunosti	12	7	7	22	9	32	12	8	109	25,4
Ukupno (f)	23	20	32	90	40	114	76	33	428	100
Ukupno (%)	5,4%	4,7%	7,5%	21,0%	9,3%	26,6%	17,8%	7,7%	100,0%	
Vrednost $\chi2$, p, V, df	$\chi2$ = 55,664; p = 0,001; V = 0,180; df = 28									

Rezultati istraživanja su prilično iznenađujući i neočekivani. Niže obrazovani zaposleni, iz kategorija nepotpuna i potpuna osnovna škola, u većem broju smatraju da obrazovanje može *u velikoj meri ili u potpunosti* da deluje da se prevaziđu situacije nevidljivog i neplaćenog rada. Razlog za takav rezultat možemo da potražimo u pretpostavci da slabije obrazovani smatraju da su nedovoljno obrazovani i da bi im upravo obrazovanje donelo neku vrstu zaštite, bolju platu, povoljniji položaj na radnom mestu i uopšte na tržištu rada.

Obrazovaniji, naročito kategorije od više i visoke škole do doktorskih studija, u većem broju procenjuju da obrazovanje ne može *nimalo ili* može *u maloj meri* da pomogne da se ta vrsta rada prevaziđe. Takav nalaz može biti posledica njihovog radnog iskustva i njihove mogućnosti da sagledaju situaciju i širu sliku, naročito imajući u vidu da je istraživanje realizovano tokom pandemije kovida 19, kada su uslovi rada bili znatno izmenjeni, a ključni radnici primorani da rade više i duže, uz istu novčanu nadoknadu, sa dodatnim zahtevima da savladaju onlajn platforme, da rade od kuće, da rade u visokorizičnim situacijama i uslovima (ILO, 2023), što je bilo karakteristično za visokointelektualne poslove koje svakako obavlja obrazovaniji kadar. Predstavljeni rezultati su statistički značajni, a veličina efekta povezanosti (V = 0,180) je niska.

U narednoj tabeli (tabela 5) predstavljamo kako ispitanici procenjuju mogućnosti delovanja obrazovanja da se prevaziđe praksa „nevidljivog“ i neplaćenog rada u odnosu na stepen njegovog obavljanja.

Tabela 5. Procena mogućnosti delovanja obrazovanja u prevazilaženju prakse „nevidljivog“ i neplaćenog rada u odnosu na stepen obavljanja „nevidljivog“ i neplaćenog rada

„Nevidljiv“ i neplaćeni rad – procena stepena obavljanja	Procena mogućnosti delovanja obrazovanja u prevazilaženju prakse „nevidljivog“ i neplaćenog rada			N	
	Nimalo ili u maloj meri	Osrednje	U velikoj meri ili u potpunosti	f	%
Nimalo ili u maloj meri	100	34	33	167	39,0
Osrednje	45	32	16	93	21,7
U velikoj meri ili u potpunosti	68	40	60	168	39,3
Ukupno (f)	213	106	109	428	
Ukupno (%)	49,8%	24,8%	25,4%	100,0%	
Vrednost $\chi 2$, p, V, df	$\chi 2 = 74{,}019^{a}$; p = 0,000; V = 0,208; df = 16				

Uviđamo da ispitanici koji procenjuju da *nimalo ili u maloj meri* obavljaju nevidljiv ili neplaćen rad u većem broju slabije procenjuju mogućnosti obrazovanja da se takva praksa prevaziđe. Kategorija ispitanika koji *u velikoj meri ili u potpunosti* procenjuju da obavljaju tu vrstu rada daje približne odgovore kada su u pitanju mogućnosti obrazovanja u njegovom prevazilaženju. Međutim, ako uzmemo u obzir i kategoriju *osrednje*, mogli bismo da kažemo da većina koja u većoj meri obavlja nevidljiv i neplaćen rad procenjuje da su mogućnosti delovanja obrazovanja da se on prevaziđe ipak značajne. I ovaj nalaz, kao i prethodni, jeste statistički značajan.

U tabelu 6 je prikazana dosadašnja participacija ispitanika u odnosu na procenu stepena obavljanja nevidljivog i neplaćenog rada.

Tabela 6. Procena stepena dosadašnje participacije ispitanika u obrazovnoj aktivnosti *Upoznavanje sa etičkim kodeksom organizacije i sankcijama u slučaju njegovog kršenja* u odnosu na procenu obavljanja „nevidljivog“ i neplaćenog rada

Upoznavanje sa etičkim kodeksom organizacije i sankcijama u slučaju njegovog kršenja – dosadašnja participacija –	„Nevidljiv“ i neplaćeni rad – procena stepena obavljanja –			N	
	Nimalo ili u maloj meri	Osrednje	U velikoj meri ili u potpunosti	f	%
Da	109	52	83	244	57,0
Ne	58	41	85	184	43,0
Ukupno (f)	167	93	168	428	
Ukupno (%)	39	21,.7%	39,3	100,0%	
Vrednost χ2, p, V, df	χ2 = 12,382; p = 0,015; V = 0,170; df = 4				

Kao što možemo da primetimo, rezultati iz tabele 6 jesu statistički značajni, ali je veličina efekta povezanosti (V = 0,170) slaba. 244 ispitanika su participirala u obrazovnoj aktivnosti *Upoznavanje sa etičkim kodeksom organizacije i sankcijama u slučaju njegovog kršenja*, što čini nešto manje od 60% uzorka. Ukoliko obratimo pažnju na ispitanike koji procenjuju da *nimalo ili u maloj meri* (109) obavljaju nevidljiv i neplaćeni rad, uviđamo da je veći broj ispitanika participirao u ovoj obrazovnoj aktivnosti. Kada pridodamo i kategoriju *osrednje* (52), možemo da zaključimo da je dve trećine uzorka u manjoj meri izloženo toj vrsti rada, što možemo da tumačimo kao povoljan uticaj te obrazovne aktivnosti. Ispitanici koji nisu participirali, u većem broju procenjuju da su u *velikoj meri ili u potpunosti* (85) izloženi praksi nevidljivog i neplaćenog rada. Takvi nalazi potvrđuju mišljenje autora (Čizmić & Vukelić, 2010; Einarsen & Hoel, 2008; ILO, 2017; Robertson & Tinline, 2008) koji tvrde da su obrazovne aktivnosti informisanja i upoznavanja veoma važan element prevencije nepovoljnih radnih uslova u organizaciji.

Osvrt na mogućnosti obrazovanja – neke mere zaštite u situacijama „nevidljivog“ i neplaćenog rada

Svetska banka (World Bank, 2019) skreće pažnju na značaj obrazovanja kao najsnažnijeg mehanizma za otklanjanje nejednakosti, koja se usled nedostatka obrazovanja prenosi sa generacije na generaciju. Jedan od predloga Svetske banke jeste izjednačavanje uslova za sticanje veština, čemu bi mogli da doprinesu socijalni ugovori.

Radni kontekst zahteva sticanje i usavršavanje kako stručnih, tako i različitih opštih, mekih, generičkih (ključnih, transferabilnih), naprednih kognitivnih i socijalnih veština (Despotović, 2010; World Bank, 2019). Da bi obezbedili svoje blagostanje u promenljivom radnom okruženju, radnici moraju da nauče da se nose sa različitim vrstama pritiska i uznemirenosti. Postoje dva načina delovanja kako bi zaposleni održali svoje psihološko blagostanje i stekli ličnu otpornost (eng. *personal resilience*), a to su (1) ublažavanje pritiska i (2) promena načina na koji se pritisci doživljavaju (Robertson & Cooper, 2011).

U prethodnim delovima rada smo ukazali na globalne i radne uslove i situacije koji omogućavaju praksu „nevidljivog" i neplaćenog rada. Taj fenomen posmatramo i iz ugla mogućnosti delovanja obrazovanja u kontekstu njegove prevencije ili prevazilaženja. Imajući u vidu globalni i radni kontekst u kojem taj fenomen nastaje i razvija se, kao i ciljne grupe koje mogu da se nađu u takvoj (prinudnoj) situaciji, predstavljamo neke od obrazovnih intervencija koje „nevidljiv" i neplaćen rad mogu da preveniraju, ublaže ili otklone.

- *Informisanje i upoznavanje zaposlenih i poslodavaca* – sa zakonskom regulativom, njihovim pravima, mogućim sankcijama (internim i spoljašnjim) i zabranama; sa etičkim kodeksom organizacije; sa raspoloživim načinima profesionalne pomoći; sa procedurama i protokolima u slučaju nepredviđenih situacija i ponašanja; sa obavezama i ulogama zaposlenih i poslodavaca i sa nadležnima za određena pitanja. Te aktivnosti imaju informativnu funkciju, a načini (obaveštenja, izveštaji, zakoni, pravilnici, brošure, internet, radionice, sastanci i dr.) i akteri (relevantna ili stručna osoba, služba, organizacija, institucija i dr.) su raznovrsni (Chappel & Di Martino, 2006; Čizmić & Vukelić, 2010; ILO, 2017; Lubarda, 2008).
- *Kreiranje adekvatnih ugovora i preciziranje prava* – uključiti u ugovore prava i obaveze i zaposlenog i poslodavca, kao i sankcije u slučaju kršenja ugovora (ILO, 2023).
- *Kreiranje zakona, pravilnika i protokola* sa jasnim smernicama, pravima, obavezama i merama u slučaju kršenja (Čizmić & Vukelić, 2010; ILO, 2017).
- *Proširenje sistema socijalne i zdravstvene zaštite* na sve radnike (ILO, 2021; ILO, 2023), sa svim formama ugovora i načinima angažovanja. Na taj način se podržava koncepcija dostojanstvenog rada, ograničava se diskriminacija na osnovu statusa zanimanja. Takođe, neophodno je primenjivati adekvatnu politiku zarade i određivati minimalne plate ključnih radnika, što povećava njihovu sigurnost, uslove rada i dostojanstvo.

- *Razvijanje mehanizama efikasne identifikacije i obezbeđivanja zaštite* (privremeno sklonište i zdravstvena zaštita, psihološko savetovanje, stručna, finansijska pomoć) i *održive reintegracije osoba izloženih prinudnom radu*, kako bi se sprečila njihova ponovna viktimizacija budući da pate od različitih posledica (finansijskih, pravnih, fizičkih, psihosocijalnih i dr.). To zahteva adekvatan pravni i zaštitni okvir, obučene i resursne inspektore rada, organe za sprovođenje zakona i subjekte socijalne zaštite (ILO, 2022).
- *Razvijanje mehanizama za žalbe* i putem telefonskih linija, mobilnih aplikacije (primer, *Apprise*). One omogućavanju osobama koje su izložene prinudnom radu ili trgovini ljudima da se identifikuju, da kontaktiraju i obrate se za pomoć relevantnoj agenciji ili organizaciji (ILO, 2022).
- *Uspostavljanje pravednog sistema nagrađivanja* – decentralizacija autoriteta i praćenje i procenjivanje radnog učinka i nagrađivanja (Grinberg & Baron, 1998)
- *Programi opšte prevencije* (eng. *General prevention programmes*) – podrazumevaju napor da se unaprede liderstvo, radni uslovi, organizaciona politika protiv bilo kog oblika nasilja, obučavanje zaposlenih i menadžera, individualne i organizacione mere (otvorena komunikacija, transparentno poslovanje, kreiranje organizacione kulture i klime u skladu sa ljudskim pravima, podsticanje etičkog i obeshrabrivanje i primena adekvatnog kažnjavanja neetičkog ponašanja i diskriminacije) (Čizmić & Vukelić, 2010; Einarsen & Hoel, 2008). Robertson i Tinlajn (Robertson & Tinline, 2008) kao aktivnosti prevencije podrazumevaju: usklađivanje (eng. *Composition*) – procedure za regrutovanje, selekcija, dodeljivanje odgovarajućih uloga zaposlenima; obučavanje i razvoj (eng. *Training and Development*); situacioni inženjering (eng. *Situational engineering*) – dizajn posla i radno okruženje u smislu organizacione kulture i klime.
- *Kreiranje realističnog opisa posla* (Chappel & Di Martino, 2006; Čizmić & Vukelić, 2010) ili, u slučaju neadekvatnog opisa posla, *redizajn posla* (eng. *Work redesign*) (Leka & Griffiths, 2004). Neadekvatan dizajn ili opis posla uzrokuje, između ostalog, stres, sagorevanje i maltretiranje. Pajević ističe potrebu za profesionalnom selekcijom i klasifikacijom, da „pravi čovek dođe na pravo radno mesto“ (Pajević, 2006, str. 127) zbog značaja da se usaglase osobine i sposobnosti zaposlenog sa zahtevima radnog mesta.

- *Realizovanje obuka* kao prioritet u zemljama gde su stupili na snagu zakoni o prinudnom radu „kako zakonske reforme ne bi nadmašile institucionalne kapacitete potrebne za njihovu primenu“ (ILO, 2022, str. 88) i generalno sprovođenje obuka kao pomoć radnicima i menadžmentu radi lakšeg i bržeg prilagođavanja različitim kriznim i rizičnim situacijama (ILO, 2023). Na primer, kada govorimo o moberima, veoma je koristan pristup da je uzrok njihovog ponašanja zapravo nepostojanje pozitivnih osobina i zaustavljen razvoj, što znači da takva ponašanja mogu da se preveniraju ili prevaziđu pomoću obrazovanja i obučavanja (Esselmont prema: Tehrani, 2012; Kecap & Mihajlović, 2018).
- *Unapređenje statusa stažista* kako ne bi postali sredstvo za iskorišćavanje (Stewart *et al.*, 2021) jer „eksploatatorske neplaćene prakse ne bi trebalo da postoje i mi ćemo raditi na tome da ih iskorenimo“ (prema: Paz-Fuchs, 2021, str. 255). Savet Evropske unije je 2014. godine usvojio Preporuku o okviru kvaliteta za pripravnike/stažiste (*Recommendation on a Quality Framework for Traineeships* – QFT) sa ciljem da se olakša prelazak iz obrazovanja na tržište rada, da se unaprede sadržaji učenja i obuka, uslovi rada (Rosin, 2021) i da se poveća transparentnost uslova pripravničkog staža njihovim uvođenjem u ugovor o stažiranju (Stewart *et al.*, 2021).
- *Primena socioemocionalne ekonomije.* Ona održava organizacione odnose i jača društvene veze putem razmene emocija, saosećanja, uvažavanja, dopadanja. Reč ekonomija, u tom kontekstu, znači da se emocije na drugačiji način štede i troše (Finneman, 2003). Emocionalni rad je često dodatni napor koji se ulaže i koji je sastavni deo određenih zanimanja. Međutim, često je nemerljiv, nije vidljiv niti dovoljno plaćen, a posledice po zaposlenog mogu biti značajne. Takođe, tu je i emocionalni rad u odnosu na kolege, u kojem se otvara kompleksno pitanje interpersonalnih odnosa i organizacione klime. U tom kontekstu, imamo fenomen *kulturne neosetljivosti* kada je određeni postupak pripadnika jedne kulture u suprotnosti sa shvatanjima druge. Na primer, u japanskoj tradicionalnoj kulturi osmeh se smatra uvredom, te su za potrebe međunarodnih poslova kompanije angažovale konsultante da japanske biznismene nauče da se smeju (Finneman, 2003, str. 42).
- *Uvođenje algoritamskog upravljanja* predstavlja „korišćenje kompjuterski programiranih procedura za koordinaciju radne snage u organizaciji“ (Baiocco *et al.*, 2022, str. 5). Ta vrsta upravljanja razvijena je na digitalnim platformama rada, gde je i najrasprostranjenija. Postoje

napori da se primeni i u „običnim“ tradicionalnim poslovima. Iako je to još uvek nedovoljno, taj proces je naročito ubrzala pandemija kovida 19. Postavlja se etičko pitanje – da li odluke koje „donose“ algoritamski sistemi mogu biti nepristrasne, poštene i pravedne. Takođe, razdvajanje koncepcije i izvršenja posla, kao i centralizacija kontrole mogu da utiču na to da radnici izgube autonomiju. Sve to može da utiče na opis posla, praćenje i procenjivanje rada, što može da dovede do „kvantifikovanja sopstvenog doprinosa na poslu“ (Moore and Robinson prema: Baiocco *et al.*, 2022, str. 18).

- *Uspostavljanje ravnoteže između posla i privatnog života*. U jednom od istraživanja sprovedenim tokom pandemije kovida 19, ispitanici su, kao stresore, između ostalog, naveli balansiranje između potreba i zahteva posla i privatnog života (36,9% ispitanika), usamljenost i osećaj izolovanosti (24,3%), preopterećenost radom do iznemoglosti usled pritiska, umora, emocionalne iscrpljenosti, prezasićenosti (sagorevanja) (22,9%). Takođe, ispitanici su izjavili da koriste različite obrazovne aktivnosti kako bi prevazišli te i druge stresore povezane sa poslom (Kecap, 2021).
- *Uvođenje i sprovođenje mera protiv prinudnog rada*: povećanje učešća i uticaja radnika – udruživanje radnika zarad kolektivnog pregovaranja; formalizacija neformalnih radnih mesta; proširenje socijalne zaštite i zakonske pokrivenosti neformalnih radnika i migranata (uključujući i donje granice); proširenje zakonske pokrivenosti; promovisanje nepristrasne i etičke regrutacije, nasuprot obmani o prirodi i uslovima rada, identitetu poslodavca, zameni ugovora i drugo; usvajanje zakona i uredbi u skladu sa međunarodnim standardima rada i smernicama; osnaživanje kapaciteta i povećanje dometa državnih inspektora rada koji imaju ulogu u prevenciji, identifikaciji i praćenju prinudnog rada, obučeni su za otkrivanje i reagovanje na prekršaje iz oblasti rada, upućuju počinioce krivičnim organima, radnike nadležnima za zaštitu radi pružanja pomoći i praćenja, imaju važnu funkciju podizanja svesti o rizicima prinudnog rada i obavezama poslodavaca, mogu imati participativni pristup koji podrazumeva angažovanje niza zainteresovanih strana u neformalnoj ekonomiji (ILO, 2022).
- *Zaustavljanje modernog ropstva* usvajanjem Ciljeva održivog razvoja do 2030. godine – globalna zajednica se obavezala da će okončati moderno ropstvo. Potreban je pristup čitavog društva, a najveću odgovornost za promene snose nacionalne vlade (ILO, 2022).
- *Regulisanje rada od kuće prema konvencijama ILO* (ILO, 2021).

Suočene sa zahtevom za poboljšanjem kvaliteta radnog života, zemlje širom sveta preispituju sisteme finansijske, zdravstvene i socijalne zaštite, sa ciljem da unaprede mogućnosti, prilike i prava radnika i otklone diskriminaciju. Da bi se podigla vidljivost rada pojedinih kategorija radnika, treba se, pre svega, pozabaviti njihovim statusom i uspostaviti sisteme socijalne, finansijske i druge zaštite, jer nisu u mogućnosti da utiču na uslove rada i ostvaruju svoja prava ako su nevidljivi za sistem.

Uzimajući u obzir sva pitanja i uslove globalnog konteksta rada, uočavamo neophodnost stalnog prilagođavanja tržištu rada i radnom okruženju, pa tako i karijernu otpornost, koja predstavlja „sposobnost zaposlenih da se nose sa pitanjima koja utiču na njihov rad“ (Noe, 2010, str. 550). Pojam ljudskog kapitala je pristup u koji treba ulagati, a koji posmatra zaposlene kao vrednost organizacije (Noe, 2010). Bez obzira na zakone, odredbe i kvalitet zaposlenih, lider je onaj koji definiše i usmerava kulturu i klimu organizacije, uslove njenog rada i način na koji se bavi pitanjima. Aktuelne promene izazivaju neizvesnost i strah za budućnost, ali i izraženu potrebu za sticanjem veština koje su neophodne za obavljanje različitih poslova i zanimanja u promenljivim uslovima. Postoji velika potreba za daljim postavljanjem pitanja o prevenciji i prevazilaženju nevidljivog i neplaćenog rada pomoću obrazovnih aktivnosti, bilo u globalnom ili radnom kontekstu.

Reference

Anđelković, B., Šapić, J., & Skočajić, M. (2019). *Gig ekonomija u Srbiji: ko su digitalni radnici i radnice iz Srbije i zašto rade na globalnim platformama?* Centar za istraživanje javnih politika.

Baiocco, S., Fernandez-Macías, E., Rani, U., & Pesole, A. (2022). The Algorithmic Management of work and its implications in different contexts. Background Paper Series of the Joint EU-ILO Project “Building Partnerships on the Future of Work”. ILO, European Commission.

Blackham, A. (2021). Working at the edges of legal protection: Equality law and youth work experience from a comparative perspective. In A. Stewart, R. Owens, N. O’Higgins, A. Hewitt (Eds.), *Internships, Employability and the Search for Decent Work Experience* (pp. 302–320). International Labour Organization, Edward Elgar Publishing Limited.

Chappel, D., & Di Martino, V. (2006). *Violence at Work.* International Labour Office.

Čabarkapa, M. (2017). *Profesionalni stres: psihologija stresa na radu.* Zavod za udžbenike.

Čizmić, S., & Vukelić, M. (2010). Maltretiranje na radnom mestu – pogled na novu perspektivu. *Andragoške studije*, *1*, 61–76.

Despotović, M. (2010). *Razvoj kurikuluma u stručnom obrazovanju*. Beograd: Filozofski fakultet Univerziteta u Beogradu.

Donkin, R. (2010). *The Future Of Work*. Palgrave Macmillan.

Duffy, M., & Sperry, L. (2014). *Overcoming Mobbing: A Recovery Guide for Workplace Aggression and Bullying.* Oxford University Press.

Einarsen, S., & Hoel, H. (2008). Bulliyng and Mistreatment at Work: How Managers May Prevent and Manage Such Problems. In A. Kinder, R. Hughes, L. C. Cooper (Eds.), *Employee Well-being Support: A Workplace Resource* (pp. 161–174). John Wiley & Sons.

EU-OSHA: European risk observatory Report. (2010). *Workplace Violence and Harassment: a European Picture.* Publications Office of the European Union.

Eurofound & ILO. (2017). *Working anytime, anywhere: The effects on the world of work.* Publications Office of the European Union, International Labour Office.

Finneman, S. (2003). *Understanding emotions at work.* Sage Publications.

Grinberg, Dž., & Baron, R. A. (1998). *Ponašanje u organizacijama: razumevanje i upravljanje ljudskom stranom rada.* Želnid.

ILO. (2017). *Inception Report for the Global Commission on the Future of Work*. ILO.

ILO. (2021). *Working from home: From invisibility to decent work*. International Labour Office.

ILO. (2022). *Global Estimates of Modern Slavery Forced Labour and Forced Marriage*. ILO, Walk Free, and International Organization for Migration (IOM).

ILO. (2023). *World Employment and Social Outlook 2023: The value of essential work*. International Labour Office.

Kecap, E. (2012). Osnovni kvaliteti obuka za ublažavanje efekata izgaranja na poslu. U Alibabić, Š., Medić, S. i Bodroški-Spariosu, B. (ur.), *Kvalitet u obrazovanju – Izazovi i perspektive* (str. 81–97). Beograd: Institut za pedagogiju i andragogiju Filozofskog fakulteta Univerziteta u Beogradu.

Kecap, E. (2021). Uloga obrazovanja u prevazilaženju stresa na poslu u vreme krize. U Š. Alibabić (ur.), *Život u kriznim vremenima – andragoški pogledi, zbornik radova* (str. 43–58). Filozofski fakultet Univerziteta u Beogradu.

Kecap, E., & Mihajlović, D. (2018). Education and Quality of Life at Work – Towards the Prevention and Overcoming of Mobbing. In B. Käpplinger, K. Ovesni, J. Vranješević (Eds.), *Strategies to Improve Quality of Education* (pp. 75–89). Institute for Pedagogy and Andragogy, Faculty of Philosophy; Institut für Erziehungswissenschaf, Justus-Liebig-Universität.

Landy, F. J., & Conte, J. M. (2013). *Work in the 21th century.* John Wiley & Sons.

Leka, S., & Griffiths, A. (2004). Work organisation and stress: systematic problemapproaches for employers, managers and trade union representatives. *Protecting workers' health series*, *3*. World Health Organization, Institut of work, health & organizations.

López López, J. (2021). Traineeships and systemic discrimination against young workers. In A. Stewart, R. Owens, N. O'Higgins, A. Hewitt (Eds.), *Internships, Employability and the Search for Decent Work Experience* (pp. 321–333). Edward Elgar Publishing Limited.

Lubarda, B. (2008). Mobing/Buling na radu. *ABC – časopis urgentne medicine*, VIII (3), 133–142.

McClatchy, S. (2014). *Decide: work smarter, reduce your stress, and lead by example.* Wiley.

Noe, R. A. (2010). *Employee training and development (5th ed.)*. McGraw-Hill/Irwin.

Pajević, D. (2006). *Psihologija rada*. Liber.

Paz-Fuchs, A. (2021). Internships, Employability and the Search for Decent Experience. In A. Stewart, R. Owens, N. O'Higgins & A. Hewitt (Eds.), *Trainees – the new army of cheap labour: Lessons from workfare* (pp. 255–268). Edward Elgar Publishing, Cheltenham.

Pejatović, A. (2019). *Obuka za odrasle – susret očekivanja i procenjivanja.* Institut za pedagogiju i andragogiju Filozofskog fakulteta Univerziteta u Beogradu.

Pejatović, A., & Orlović Lovren, V. (2014). *Zaposlenost i obrazovanje posle pedesete.* Institut za pedagogiju i andragogiju Filozofskog fakulteta Univerziteta u Beogradu; Društvo andragoga Srbije.

Robertson, I., & Cooper, C. (2011). *Well-Being: Productivity and Happiness at Work.* Palgrave Macmillan.

Robertson, I., & Tinline, G. (2008). Understanding and Improving Psychological Well-being for Individual and Organisational Effectiveness. In A. Kinder, R. Hughes, L. C. Cooper (Eds.), *Employee Well-being Support: A Workplace Resource* (pp. 39–49). John Wiley & Sons.

Rosas, G., & Corbanese, V. (2006). *Glossary of key terms on learning and training for work.* International Training Centre of the ILO.

Rosin, A. (2021). Fundamental rights broadening the scope of labour law? The example of trainees. In A. Stewart, R. Owens, N. O'Higgins, A. Hewitt (Eds.), *Internships, Employability and the Search for Decent Work Experience* (pp. 285–301). Edward Elgar Publishing Limited.

Stewart, A. (2021). The nature and prevalence of internships. In A. Stewart, R. Owens, N. O'Higgins, A. Hewitt (Eds.), *Internships, Employability and the Search for Decent Work Experience* (pp. 17–33). Edward Elgar Publishing Limited.

Stewart, A., Owens, R., O'Higgins, N., & Hewitt, A. (2021). Internships: A policy and regulatory challenge. In A. Stewart, R. Owens, N. O'Higgins, A. Hewitt (Eds.), *Internships, Employability and the Search for Decent Work Experience* (pp. 2–16). Edward Elgar Publishing Limited.

Tehrani, N. (2012). Introduction to workplace bullying. In: Noreen Tehrani (Ed.), *Workplace Bullying: Symptoms and Solutions* (pp. 1–18). New York: Routledge.

Walton, M. (2008). In Consideration of a Toxic Workplace: a Suitable Place for Treatment. In A. Kinder, R. Hughes, L. C. Cooper (Eds.), *Employee Well-being Support: A Workplace Resource* (pp. 9–24). John Wiley & Sons.

World Bank (2019). *World Development Report 2019: The Changing Nature of Work.* World Bank.

Edisa Kecap[5]
Faculty of Philosophy, University of Belgrade

Dubravka Mihajlović[6]
Faculty of Philosophy, University of Belgrade

Aleksandra Pejatović[7]
Faculty of Philosophy, University of Belgrade

Education: The Way Out of the Shadows of Invisible and Unpaid Work

Abstract: The goal of this empirical research is to examine the assessments of the possible impact of education on overcoming the practice of "invisible" and unpaid labour of employees. We have analyzed the phenomenon of "invisible" and unpaid labour in two contexts: (1) In the *global* context, this phenomenon is understood as a general situation on the labour market, where forms of non-standard, more flexible forms of work engagement are increasingly present, including informal work and the categories of "invisible" and digital workers, the modern slavery phenomenon, as well as the phenomenon of precarious work, which is mainly characterized by temporary workers' insecure and uncertain positions, limited access to and inadequate coverage provided by the systems of legal, social, and health protection; (2) In the *work* context, by "invisible" and unpaid work we mean "hidden", overtime, unrecognized, and unpaid unpaid daily tasks and activities performed by employees, which. This situation particularly affects certain categories of employees. In this context, forced labour is also explained as part of modern slavery. Our research was conducted by using a sample of 428 employed respondents in Belgrade during the COVID-19 pandemic. The results of the research provide answers to several questions: to what extent respondents assess their work as "invisible" and unpaid, what possibilities for overcoming the practice of such work, in their assessment, education provides, and whether, in relation to their assessment of the extent of performing "invisible" and unpaid labour, the respondents participated in an educational activity that thematically touched upon introducing them to the ethical code of their organization and sanctions in case of its violation. In the context of a continuing review of the level of democracy in society, we believe that the issue of the visibility of the unfavorable positi-

[5] Edisa Kecap, PhD, is an Assistant Professor and Research Fellow at the Faculty of Philosophy, University of Belgrade (edisa.kecap@f.bg.ac.rs).

[6] Dubravka Mihajlović, PhD, is an Assistant Professor and Research Fellow at the Faculty of Philosophy, University of Belgrade (dunja_mihajlovic@yahoo.com).

[7] Aleksandra Pejatović, PhD, is a Full Professor at the Faculty of Philosophy, University of Belgrade (apejatov@f.bg.ac.rs).

on and value of certain categories of employees is important and calls for responsibility and active engagement of work organizations, legislation, and society. To emerge from the shadow of this important issue, we view education as the torch that, first of all, can point to the facts that were "invisible" up until now, shed a light, and show us the path to resolve this issue in the future.

Key words: invisible and unpaid labour, forced labour, informal work, adult education, COVID-19 pandemic

Andragoške studije, issn 0354–5415, broj 11, decembar 2023, str. 133–151
 Originalni naučni rad
UDK 37.014.54:[331:342.813(497.11)(495.6)
doi: 10.5937/AndStud2302133B

Lepa Babić[1]
Singidunum University

The Development and Preliminary Validation of the Coyre Competencies for Employment Scale (CCES)

Abstract: Past authors produced a framework to outline the core competencies needed for employment in the 21st-century workforce. However, this framework was not implemented for developing personalised educational plans to nurture competencies in students. This study developed and validated the Core Competencies for Employment Scale (CCES) to identify core competencies that final-year students should develop to become employable in the 21st century. The sample included 521 final-year undergraduate students, who assessed their possession of 24 core competencies and their perceptions of how employers value them. Differences in scores in these two assessments helped gauge the areas of core competencies improvement. Exploratory factor analysis grouped the 24 competencies into four factors: Skills, Capacity for Change, General Literacy, and Digital Literacy. The four-factor structure was confirmed. The study concluded that the CCES can help educators identify core competencies that students should develop before employment.

Keywords: core competencies, 21st-century workforce, employability, personalised educational plans, competency-focused education

Introduction

In today's fast-paced and ever-changing world, the concept of competencies has gained particular importance. Competencies are a bridge that connects the realm of education with the demands of the job market (Lilia & Elena, 2019). They are tangible skills and qualities that students bring to potential employers and are core to improving their career opportunities, job performance, and personal and professional growth (Teijeiro et al., 2013). Competencies are crucial, as shown by

[1] Lepa Babić, PhD, is an Associate Professor at the Singidunum University, Serbia (lbabic@singidunum.ac.rs).

the fact that the main mission of the Organization for Economic Cooperation and Development (OECD, 2023a) is to help governments enable young people to acquire the skills necessary for future employment. The OECD (2023a) recognises that nurturing the right competencies is critical to achieving this goal. The OECD (2023b) supports research on identifying the most important competencies for the 21st century, and many other research endeavours aim to determine the core competencies that enhance the employability of final-year students (Burrus et al., 2013; Finegold & Notabartolo, 2008).

Despite the abundance of literature on competencies, there is no universally accepted definition of this construct. Most competencies are subject to varying interpretations because they lack a well-defined operationalisation and are not clearly linked to specific actions (Shavelson, 2010). Operationalisation is challenging because the concept of competencies is a hypothetical construct, an abstract idea that cannot be directly observed (Lilia & Elena, 2019). On the other hand, students' competencies are closely linked to their employability (Teijeiro et al., 2013) and performance in subsequent careers (Akkermans & Tims, 2017), meaning that they are a highly significant term with concrete implications for educational and professional practice.

The most prominent definition of competencies equates them to "a set of knowledge, skills, and attitudes that enable a person to perform tasks at a specific job" (McClelland, 1998, p.2). Although useful, this definition does not capture the broader applicability of competencies across employment settings. According to the OECD Program Definition and Selection of Competencies (DeSeCo), competencies are more than just knowledge and skills necessary for a particular job. They encompass the ability to face complex demands by activating psychosocial resources, including knowledge and skills, in a wide variety of contexts (Rychen & Salganik, 2003). This definition is dynamic as it highlights the dynamic nature of competencies by emphasising their adaptability across work contexts.

The most useful conceptualisation of competencies derives from the literature on 'core competencies'. Core competencies are a set of fundamental skills, knowledge, and attributes that are not tied to a specific subject or area but are desirable regardless of a person's discipline or chosen profession (Rieckmann, 2012). These competencies are a foundation for developing more specialised competencies and are valued across contexts (Kuijpers & Meijers, 2011). In the setting of post-graduation employment, core competencies assist students in building a skillset that can be applied to various pro fessional roles, enabling them to adapt to different work situations (Espinoza & Ukleja, 2016). For this reason, it is commonly suggested that students should be educated in a way that equips them with core competencies that would allow them to navigate through subsequent careers regardless of their career choice (Rieckmann, 2012). Core competencies are particularly important in the 21st century as they help final-year students excel in working environments that are characterised by complex challenges, rapid technological advancements, and changing job landscapes, which require significant adaptation and transferability of skills (Burrus et al., 2013).

Given the essentiality of core competencies for the students' employment and subsequent careers, it is crucial to recognise which competencies are needed for students' success in the 21st-century workforce. This recognition can aid the planning of competency-focused education, the development of methods for assessing competencies, and the alignment of educational programmes to the needs of the labour market (Boahin & Hofman, 2014). The most comprehensive research into the classification of core competencies has so far been conducted by Burrus et al. (2013), who based their classification on three frameworks: Finegold and Notabartolo's (2008) framework, the Assessment and Teaching of the 21st Century Skills (ACTS21) framework, and the Partnership for 21st Century Skills (P21) framework.

The first framework arose from an examination of the literature on the requirements for future jobs (Finegold & Notabartolo, 2008). It identified the following five groups of competencies needed for students' employment success regardless of their background: Analytical Skills, Interpersonal Skills, Ability to Execute, Information Processing, and Capacity for Change. The ATC21S framework developed a list of core competencies by having industry experts examine worldwide curricula designed for developing 21st-century skills in final-year students (Binkley et al., 2012). It recognised the essentiality of the following groups of competencies: Ways of Thinking, Ways of Working, Tools for Working, and Living in the World. The P21 framework was developed via the input of experts from Microsoft, the US Department of Education, and other companies and institutions, and it listed the following competencies groups: Core Topics and Themes of the 21st Century, Learning and Innovation Skills, Information, Media, and Technology Skills, and Life and Career Skills (Partnership for 21st Century Skills, 2012). By analysing these three frameworks, Burrus et al. (2013) concluded that 24 competencies can be grouped into five categories of the Finegold and Notabartolo's (2008) framework, with the exclusion of the Living in the World category from the ATC21S framework and the Core Topics and Themes of the 21st Century category from the P21 framework. This yielded seven categories, which are illustrated in Table 1.

Table 1. Core competencies identified across three frameworks (taken from Burrus et al., 2013)

Categories	Competencies	Finegold & Notabartolo (2008)	ATC21S	P21
Analytical skills	Critical thinking	X	X	X
	Problem-solving	X	X	X
	Decision-making	X	X	
	Research and inquiry	X		
Interpersonal skills	Communication	X	X	X
	Collaboration	X	X	X
	Leadership and responsibility	X		X
Ability to execute	Initiative and self-direction	X		
	Productivity	X		
Information processing	Information literacy	X	X	X
	Media literacy	X	X	X
	Digital citizenship	X		
	ICT operations and concepts	X		
Capacity for change	Creativity/innovation	X	X	X
	Adaptive learning	X	X	
	Flexibility	X		
Core topics and themes of the 21st century	Knowledge of core academic topics			X
	Global awareness			X
	Financial, business, and entrepreneurial literacy			X
	Health literacy			X
	Environmental literacy			X
Living in a culture	Citizenship/civic literacy		X	X
	Life and career		X	X
	Personal and social responsibility		X	

Although Burrus et al. (2013) provided a valuable framework for classifying 21st –century workforce competencies, none of the researchers implemented the framework to explore how to help students develop these competencies for success in future jobs. The literature recognises the necessity of identifying a gap between the final-year students' core competencies and competencies needed for employment since such identification could aid the development of education programmes that would improve students' employability (Rieckmann, 2012). The literature also emphasises the importance of developing personalised educational plans, as opposed to one-size-fits-all educational plans, that would assist students in this regard (Fariani et al., 2023). Personalised educational plans are customised and specifically tailored educational strategies designed to meet the unique employability needs of individual students (Keppell, 2014). Having such plans readily available would be instrumental in fostering the final-year students' readiness for a diverse and dynamic job market.

Lack of methods for assessing the areas of improvement in students' core competencies is the main reason why the framework of 21st-century competencies has not informed the development of personalised educational plans . Even though Burrus et al. (2013) developed a core competencies framework based on past literature, they did not transform this framework into a valid and reliable measure that could gauge the competencies that final-year students need to cultivate before employment. To address this research gap, this study aimed to develop and validate a measure based on Burrus et al.'s (2013) framework. The measure, named the Core Competencies for Employment Scale (CCES), sought to pinpoint discrepancies between the final-year students' core competencies and their perceived relevance for employment. This gap was hoped to inform the development of personalised educational plans for the improvement of core competencies. The study evaluated the CCES' factor structure, content validity, reliability, and usefulness for the development of personalised educational plans during its development and validation.

Method

Sample

The sample comprised 521 students who were completing their final year of undergraduate studies. Out of them, 288 (55.3%) were female, and 232 (44.7%) were male. Their mean age was 22.4 (SD = 2.81). Students were recruited across seven universities, with 332 (63.7%) studying in Belgrade and 189 (36.3%) in Skopje.

Scale Development

The content of the CCES was drawn from the framework of core competencies for the 21st –century workforce developed by Burrus et al. (2013) based on the research by Binkley et al. (2012), Finegold and Notabartolo (2008), and Partnership for 21st Century Skills (2012). The framework identified 24 core competencies, which were grouped into seven categories (see Table 1). In the CCES, students were presented with these 24 competencies and asked to estimate the extent to which they have developed them during their studies. The rating scale ranged from 1 (*not at all*) to 7 (*completely*). Following this, students were again presented with the list of 24 competencies and were required to rate the degree to which they believe employers considered them important, again on a 1–7 rating scale. The first measure was labelled as 'self-assessment of core competencies' and the second 'the perception of required core competencies'. The difference between the scores on the first and second measures was calculated to capture the areas in which the students need to develop their competencies.

Procedure

The sample size was determined by the number of students who completed the scale within eight weeks. Participation unfolded online. The participants were informed that the study explored their evaluation of competencies needed for employment. They first evaluated their possession of core competencies and then gauged their perceptions of the extent to which employers consider these competencies important. Definitions for all core competencies were provided to assist the participants in evaluating them fully. For instance, *adaptive learning* was defined as "the ability to acquire and apply new knowledge and skills by continuously adjusting one's learning method and strategies" (Finegold & Notabartolo, 2008, p.23), and health literacy as "the ability to access, and evaluate, and effectively utilise health-related information and services to make informed decisions" (Partnership for 21st Century Skills, 2012, p.24).

All participation was voluntary and the study adhered to the ethical principles of anonymity, confidentiality, and the right of withdrawal. The universities granted permission for the study.

Results

Factor Analysis

Exploratory factor analysis (EFA) was performed separately for the self-assessment of core competencies and the perception of required competencies for employment. The suitability of data for EFA was evaluated via Keiser-Meyer-Olkin (KMO) values and Bartlett's tests of sphericity (Flora et al., 2012). In the first EFA, KMO was .891 and Bartlett's test of sphericity was significant ($X^2(276) = 1849.33$, $p <.001$), indicating that the data were suitable for analysis. Promax rotation was employed on the items to determine the configuration of the CCES when measuring the self-assessment of competencies. Cattell's scree test and Horn's parallel analysis indicated the suitability of a three-factor solution.

In combination, the three factors explained 53.38% of the variance. The first factor explained 39.68%, the second factor 7.87%, and the third factor 5.82% of the variance. Factor loadings are shown in Table 2. They suggest a clear distinction in competencies based on their content. The first component included competencies related to social, cognitive, and other skills, and the other two components included competencies related to various forms of literacy. Consequently, the first component was named Skills, the second General Literacy, and the third Literacy in the Digital Age or simply Digital Literacy. Skills seem to encompass competencies developed through practice, while literacy denotes the acquisition of knowledge and its practical application.

Table 2. Results of EFA for the self-assessment of core competencies grouped into three factors

Competencies	F1	F2	F3	Com
Leadership and responsibility	.79			.62
Decision-making	.73			.53
Critical thinking	.72			.52
Problem-solving	.71			.50
Collaboration	.70			.49
Initiative and self-direction	.67			.45
Research and inquiry	.67			.45
Communication	.67			.45
Productivity	.59		.35	.34
Flexibility	.50			.25
Adaptive learning		.45		.24
Environmental literacy		.82		.67
Financial, business, and entrepreneurial literacy		.81		.66
Health literacy		.81		.66
Global awareness		.80		.64
Citizenship/civic literacy		.68		.46
Personal and social responsibility		.61		.37
Knowledge of core academic topics		.49		.24
Life and career		.48		.23
Creativity/innovation		.35		.12
ICT operations and concepts			.89	.79
Information literacy			.84	.71
Digital citizenship			.80	.64
Media literacy			.72	.52

The EFA was repeated to determine the factor structure of the CCES when measuring the students' perceptions of required competencies for employment. The data were suitable for factor analysis, as indicated by the KMO value of .904 and the significance of Bartlett's test of sphericity ($X^2(276) = 1911.62$, $p < .001$). Like in the previous analysis, Promax rotation was employed. Cattell's scree test suggested the suitability of a three– or a four-factor solution. However, as Horn's parallel analysis recommended retaining three factors, three factors were extracted.

Taken together, the three factors accounted for 58.62% of the variance, with the first factor explaining 41.92%, the second 10.94%, and the third 5.77% of the variance. Table 3 shows factor loadings in this analysis, indicating a differentiation in competencies based on their content. As in the previous EFA, the isolated factors were Skills, General Literacy, and Digital Literacy. There were differences in how strongly some competencies loaded onto different factors and in the factors onto which they have loaded. Thus, f*lexibility* loaded to a similar degree onto the Skills and Digital Literacy factors, and *citizenship/civic literacy* loaded similarly onto the General Literacy and Digital Literacy factors. *Adaptive learning* loaded onto Digital Literacy instead of the Skills factor, and *creativity/innovation* loaded onto Skills instead of the Digital Literacy factor.

Table 3. Results of EFA for the assessment of required competencies for employment grouped into three factors

Competencies	F1	F2	F3	Com
Decision-making	.93		-.35	.86
Problem-solving	.86			.74
Critical thinking	.75			.56
Communication	.75			.56
Collaboration	.71			.50
Leadership and responsibility	.69			.48
Productivity	.61		.34	.37
Research and inquiry	.56	.30		.32
Initiative and self-direction	.55			.30
Creativity/innovation	.40			.16
Environmental literacy		.89		.79
Health literacy		.89		.79
Global awareness		.84		.71
Knowledge of core academic topics		.76		.58
Personal and social responsibility		.62		.38
Life and career		.62		.38
Citizenship/civic literacy		.57	.51	.32

Competencies	F1	F2	F3	Com
Financial, business, and entrepreneurial literacy		.47	.32	.22
Adaptive learning		.45		.22
ICT operations and concepts			.89	.79
Digital citizenship			.83	.69
Information literacy			.75	.56
Media literacy		.32	.58	.34
Flexibility	.33		.35	.13

Since competencies in Finegold and Notabartolo's (2008) category Capacity for Change change factors and/or factor loadings when measuring self-assessment of personal competencies and the perception of required competencies, it seemed reasonable to attempt to extract four factors in both measures. This attempt was first completed for the self-assessment of core competencies. The four factors altogether accounted for 68.12% of the variance. The first factor explained 43.29%, the second 11.54%, the third 8.02%, and the fourth 5.27% of the variance. Table 4 displays factor loadings in this analysis. There was a clear grouping of competencies into four factors, which can now be labelled as Skills, Capacity for Change, General Literacy, and Digital Literacy.

Table 4. Results of EFA for the self-assessment of core competencies grouped into four factors

Competencies	F1	F2	F3	F4	Com
Leadership and responsibility	.81				.66
Decision-making	.77				.59
Critical thinking	.75				.56
Problem-solving	.71				.50
Collaboration	.70				.49
Initiative and self-direction	.69				.48
Research and inquiry	.69				.48
Communication	.62				.38
Productivity	.55			.31	.30
Flexibility		.73			.53
Adaptive learning		.68			.46
Creativity/innovation		.54			.29
Environmental literacy			.84		.71
Financial, business, and entrepreneurial literacy			.83		.69
Health literacy			.83		.69
Global awareness			.82		.67
Citizenship/civic literacy			.71		.50
Knowledge of core academic topics			.67		.45

Competencies	F1	F2	F3	F4	Com
Personal and social responsibility			.55		.30
Life and career			.51	.32	.26
ICT operations and concepts				.88	.77
Information literacy				.83	.69
Digital citizenship				.82	.67
Media literacy				.74	.54

The analysis was repeated for the perception of the required competencies. The four factors explained a total of 64.21% of the variance, with the first factor explaining 40.12%, the second 10.23%, the third 8.62%, and the fourth 5.24% of the variance. The obtained factor loadings are summarised in Table 5. As was the case in the previous EFA, the competencies loaded almost ideally onto the Skills, Capacity for Change, General Literacy, and Digital Literacy factors. The four-factor solution appeared the best fit for the data as there were no pronounced inconsistencies in how competencies were grouped into factors in this EFA and the previous one.

Table 5. Results of EFA for the assessment of required competencies for employment grouped into four factors

Competencies	F1	F2	F3	F4	Com
Decision-making	.94				.88
Problem-solving	.88				.77
Communication	.77				.59
Critical thinking	.75				.56
Collaboration	.73				.53
Leadership and responsibility	.70				.49
Productivity	.65		.33		.42
Initiative and self-direction	.60				.36
Research and inquiry	.58				.34
Creativity/innovation		.69			.48
Adaptive learning		.66			.44
Flexibility		.62			.38
Environmental literacy			.89		.79
Health literacy			.87		.76
Global awareness			.86		.74
Knowledge of core academic topics			.78		.61
Life and career			.65		.42
Personal and social responsibility			.64		.41
Citizenship/civic literacy			.59	.30	.35
Financial, business, and entrepreneurial literacy			.56		.32

Competencies	F1	F2	F3	F4	Com
ICT operations and concepts				.91	.66
Digital citizenship				.84	.71
Information literacy				.76	.58
Media literacy				.60	.36

A confirmatory factor analysis (CFA) was performed in SPSS AMOS to try to confirm the four-factor structure. The analysis done on the measure assessing the self-assessment of core competencies yielded the following parameters: $x2 = 517.4$, $p < .001$, goodness of fit (GFI) = .92, adjusted goodness of fit (AGFI) = .91, CFI = .91, standard root mean square residual (SRMR) = .05, and root mean square error of approximation (RMSEA) = .07. All these parameters were in the expected range (Kline, 2016), indicating the adequacy of the model fit. The obtained parameters on the measure assessing the perceptions of required competencies were: $x2 = 498.7$, $p < .001$, GFI = .91, AGFI = .90, CFI = .83, SRMR = .07, and RMSEA = .06. Only the CFI was smaller than its cut-off value (i.e.,> .90), although not much. Considering these findings, the four-factor model appeared appropriate for capturing both the students' self-assessment of core competencies and perceptions of required competencies for employment.

Reliability Analysis

Internal consistency was evaluated for the self-assessment of core competencies and of perceptions of required competencies separately. Cronbach's alphas for the whole measures were .85 and .84, indicating good internal consistency. Skills factor had excellent (Cronbach's alphas = .91 and .92, respectively), Capacity for Change acceptable (Cronbach's alphas = .78 and .75, respectively), General Literacy good (Cronbach's alphas = .82 and .83, respectively), and Digital Literacy good internal consistency (Cronbach's alphas = .88 and .86, respectively).

Descriptive Analysis

A descriptive analysis was performed to gauge the usability of the CCES to identify the students' most and least developed competencies, their perceptions of the most and least important competencies from the employers' perspectives, and areas for improvement of their competencies. On average, the students evaluated their Skills competencies as the most developed and their Digital Literacy competencies as the least developed. Similarly, they thought that employers valued the Skills competencies the most and the Digital Literacy competencies the least. An inspection of the differences in scores on the two measures offered insights into the areas of the students' competencies development needs. The greatest differences or discrepancies were observed for Skills competencies. The highest difference scores were identified for the following skills: *problem-solving*, *research and inquiry*, *communication*, *decision-making*, *productivity*, and *leadership and responsibility.* Although, Capacity for Change, General Literacy, and Digital Literacy categories obtained lower difference scores in comparison, some individual competencies did have relatively high difference scores (> .50). They included *creativity/innovation* in the Capacity for Change category; *financial, business, and entrepreneurial literacy* in the General Literacy category; and *ICT operations and concepts* in the Digital Literacy category.

Table 6. Descriptive statistics for self-assessment of core competencies, perceptions of required core competencies, and difference scores

Competencies	Self-assessment		Perceptions		Diff
	M	SD	M	SD	
Skills	4.53	1.18	5.18	1.05	.65
Critical thinking	4.38	1.07	4.65	1.23	.27
Collaboration	4.85	1.25	5.30	.99	.45
Communication	4.76	1.19	5.48	.87	.72
Decision-making	4.56	1.17	5.16	1.09	.60
Initiative and self-direction	4.61	1.13	4.91	1.08	.30
Leadership and responsibility	4.50	1.27	5.04	1.11	.54
Problem-solving	4.20	1.10	5.15	1.02	.95
Productivity	4.69	1.09	5.29	.97	.60
Research and inquiry	4.24	1.31	5.08	1.12	.84
Capacity for Change	4.64	1.13	5.03	1.03	.39
Adaptive learning	4.59	1.13	4.87	1.08	.28
Creativity/innovation	4.58	1.15	5.08	1.06	.50
Flexibility	4.76	1.10	5.14	.95	.38
General Literacy	4.46	1.23	4.69	1.17	.23
Citizenship/civic literacy	4.52	1.22	4.75	1.15	.23
Environmental literacy	4.44	1.41	4.34	1.42	-.10
Financial, business, and entrepreneurial literacy	4.00	1.33	4.66	1.25	.66
Global awareness	4.42	1.21	4.55	1.19	.13
Health literacy	4.42	1.35	4.40	1.29	-.02
Knowledge of core academic topics	4.28	1.15	4.62	1.16	.34
Life and career	4.67	1.15	5.02	.97	.35
Personal and social responsibility	4.92	1.04	5.09	.96	.17

Competencies	Self-assessment		Perceptions		Diff
	M	SD	M	SD	
Digital Literacy	4.24	1.31	4.60	1.19	.36
Digital citizenship	4.26	1.37	4.51	1.24	.25
ICT operations and concepts	4.15	1.39	4.69	1.19	.54
Information literacy	4.41	1.19	4.94	1.07	.53
Media literacy	4.14	1.27	4.27	1.25	.13

Discussion

Core competencies are essential for the final-year students' employment and subsequent careers (Espinoza & Ukleja, 2016; Rieckmann, 2012). To aid the planning of competency-focused education, this study transformed Burrus et al.'s (2013) core competencies framework into a measurement tool that assesses the students' possession of core competencies, their perceptions of required competencies for employment, and the gap between the two. The tool was named the Core Competencies for Employment Scale (CCES) and its factor structure, content validity, reliability, and usefulness for educational practice were explored in depth. To discuss the obtained findings, the focus now moves to presenting the findings and linking them to Burrus et al.'s (2013) framework, identifying implications for educational practice, and outlining the study's limitations, delimitations, and directions for future research.

In the core competencies framework, Burrus et al. (2013) grouped 24 core competencies identified in past literature (Binkley et al., 2012; Finegold & Notabartolo, 2008; Partnership for 21st Century Skills, 2012) into seven categories (see Table 1). Initial factor analysis found that these 24 competencies could be better grouped into three underlying factors, labelled as Skills, General Literacy, and Digital Literacy. However, an inspection of factor loadings revealed that not all competencies loaded onto the same factors when the CCES was used to evaluate the self-assessment of the final-year students' competencies and their perceptions of required competencies for employment. Given this discrepancy in factor loadings, as well as some indicators suggesting that a four-factor model could suit the data, the study tested a four-factor solution. Exploratory and confirmatory factor analyses suggested that the four-factor model was suitable for capturing students' self-assessment of core competencies and perceptions of required competencies for employment. The following four factors were identified and confirmed: Skills, Capacity for Change, General Literacy, and Digital Literacy. The reliability of the overall CCES and its four subscales was acceptable to excellent.

There was a noteworthy overlap between the four factors of the CCES and the categories of core competencies identified by Burrus et al. (2013). Categories of Analytical Skills, Interpersonal Skills, and Ability to Execute, together with their corresponding competencies, made up the Skills factor in the CCES. The Capacity for Change factor encompassed the three Capacity for Change competencies, and the Digital Literacy factor encompassed the four Information Processing competencies. The General Literacy factor combined the competencies of Core Topics and Themes of the 21st Century and Living in a Culture categories.

Despite the significant overlap, the results of this study indicate that core competencies of the 21st-century workforce are more accurately grouped into four versus seven categories originally identified by Burrus et al. (2013). These categories can be defined as follows. *Skills* are core competencies that are developed through practice and that help students navigate through cognitive, interpersonal, and motivational job demands, regardless of their career choice. *Capacity for change* competencies can assist students in expressing, developing, and adapting themselves when placed in new work environments, while *digital literacy* competencies allow them to embrace the technological advancements and requirements in future job positions. Finally, *general literacy* competencies are useful in equipping final-year students with the ability to navigate through the requirements of the 21st-century workforce, such as by being mindful of environmental, health and citizenship needs, understanding academic topics, operating in modern business environments, and balancing work/life demands.

Apart from identifying the most valid categorisation of core 21st-century competencies, this study demonstrated the usability of the CCES for crafting personalised educational plans that would foster the students' employability. The CCES could help educators understand which core competencies individual students have developed and which competencies they must develop further to enhance readiness for a diverse job market. In the assessed sample, results suggested that the students would benefit from boosting several competencies, including problem-solving, research and inquiry, communication, productivity, and financial, business, and entrepreneurial literacy. All these competencies are crucial for thriving in today's complex professional landscape (Burrus et al., 2013). These results, however, apply to a whole sample of final-year students', while, in practice, it might be better to gauge which areas of competencies individual students need to improve (Fariani et al., 2023).

If educators administer the CCES to identify a gap between a given student's core competencies and his or her perceptions of their importance, they could develop personalised educational plans that would inform the tailoring of interventions to address specific core competencies gaps. For instance, they could leverage the insights from the CCES to create targeted learning experiences that would enhance particular competencies students think they are lacking. Such targeted learning experiences could encompass career dialogue, vocational coaching, and real-world projects that would aim to build a given set of competencies (Kuijpers & Meijers, 2011). This personalised approach would ensure that educational interventions are precisely aligned with a given student's core competencies gap and are tailored to help that particular student become employable irrespective of a chosen career path (Keppell, 2014).

Although it demonstrated the reliability, validity, and usefulness of the CCES for practice, this study had at least two limitations that must be considered when interpreting the findings. First, the research procedure for administering the CCES was not piloted to ensure that the provided definitions of the 24 core competencies are understandable to final-year students. Without such a pilot in place, the study could have failed to clarify the definitions of the competencies for the participants, thus reducing the accuracy of their responses and overall engagement in the assessment (Gudmundsdottir & Borck-Utne, 2010). Second, the CCES was developed to gauge the gap between the students' self-assessment of their core competencies and their perceptions of how these competencies are valued by employers. It is questionable whether final-year students have sufficient knowledge and awareness of how employers assess the significance of core competencies. In theory, it would have been better if the CCES had evaluated the gap between the students' self-assessment of core competencies and the employers' perceptions of these competencies' importance. However, this approach was deemed unfeasible for educational practice because it would require a collaborative effort between academic institutions and employers when assessing competencies and would pose a logistical challenge in the context of developing personalised educational plans. Nonetheless, the absence of employer input in the CCES raises concerns about the instrument's external validity as the tool may not accurately reflect the employers' perceptions of competency demands in the 21st-century professional landscape.

Though limited, the study had several strengths or delimitations that could have increased the trustworthiness of the findings. The sample size was sufficiently large (N = 521) for exploratory and confirmatory factor analyses (Flora & Flake, 2017). The sample was also balanced in terms of the participants' gender and it included final-year undergraduate students from seven universities across two countries. All these strengths translate to increased sample representativeness and generalisability (Briesch et al., 2014). The study also applied up-to-date guidelines on performing exploratory and factor analyses (Flora et al., 2012; Kline, 2016) and was thus robust and methodologically sound, qualities enhancing the validity and reliability of its outcomes.

To improve the validity and practical usefulness of the CCES, future researchers need to overcome the limitations of this study. The first recommendation is to test the final-year students' understanding of the definitions of core competencies provided when administering the CCES. If it transpires that students misinterpret or do not fully understand some of the competencies, future scholars need to refine the definitions to ensure clarity and comprehension, and thus improve the accuracy of the assessment. The second recommendation is to administer the CCES to employers who are representative of a wide variety of professional fields. It would then be possible to gauge potential discrepancies in how employers and students evaluate the importance of the core competencies. If such discrepancies are abundant, then personalised educational plans could be developed by identifying gaps in the final-year students' core competencies and the importance of those competencies as assessed by employers. To overcome the potential logistical challenges recognised above, an option would be to use the employers' competencies ratings, as found in large-scale research studies, as a benchmark or a reference point whenever recognising the students' core competencies gaps. In this adaptation of the CCES, the students would need to evaluate their possession of core competencies only once and educators would then compare these competencies to the employers' ratings to identify areas for the improvement of core competencies. This procedure, however, would require an immensely large and fully representative sample of employers to ensure that their ratings of core competencies generalise to all professional fields (Briesch et al., 2014).

In conclusion, this research succeeded in developing and validating an instrument for pinpointing core competencies that final-year students need to develop to increase their employability in the 21st-century market. The implications of this study are noteworthy as the CCES can assist educators in developing personalised educational plans for the improvement of core competencies. Future research, however, needs to refine the CCES to address the identified limitations, specifically by testing and improving the final-year students' understanding of core competencies definitions and obtaining comprehensive input from a diverse array of employers.

References

Akkermans, J., & Tims, M. (2017). Crafting your career: How career competencies relate to career success via job crafting. *Applied Psychology*, *66*(1), 168–195. https://doi.org/10.1111/apps.12082

Binkley, M., Erstad, O., Herman, J., Raizen, S., Ripley, M., Miller-Ricci, M., & Rumble, M. (2012). Defining twenty-first skills. In P. Griffin, McGaw, B., & E. Care (Eds.), *Assessment and teaching of 21st century skills* (pp. 17–66). Springer.

Boahin, P., & Hofman, W. H. A. (2014). Perceived effects of competency-based training on the acquisition of professional skills. *International Journal of Educational Development*, *36*(1), 81–89. https://doi.org/10.1016/j.ijedudev.2013.11.003

Briesch, A. M., Swaminathan, H., Welsh, M., & Chafouleas, S. M. (2014). Generalizability theory: A practical guide to study design, implementation, and interpretation. *Journal of School Psychology*, *52*(1), 13–35.

Burrus, J., Jackson, T., Xi, N., & Steinberg, J. (2013). Identifying the most important 21st century workforce competencies: An analysis of the occupational information network (O*NET). *ETS Research Report Series*, *213*(2), 1–55. https://doi.org/10.1002/j.2333–8504.2013.tb02328.x

Espinoza, C., & Ukleja, M. (2016). *Managing the millennials: Discover the core competencies for managing today's workforce*. John Wiley & Sons.

Fariani, R., Junus, K., & Santoso, M. (2023). Personalised learning in vocational higher education: A model for diverse learners. *Research Square*, *12*(2), 1–31. https://doi.org/10.21203/rs.3.rs-3404282/v1

Finegold, D., & Notabartolo, A. S. (2008). 21st century competencies and their impact: An interdisciplinary literature review. *Transforming the US Workforce Development System, 19*(1), 19–56. https://citeseerx.ist.psu.edu/document?repid=rep1&type=pdf&doi=bb5c062f821a3fadb89f0cae0aaaaa0ff837d611

Flora, D. B., & Flake, J. K. (2017). The purpose and practice of exploratory and confirmatory factor analysis in psychological research: Decisions for scale development and validation. *Canadian Journal of Behavioral Science*, *49*(2), 78–88. https://doi.org/10.1037/cbs0000069

Flora, D. B., LaBrish, C., & Chalmers, R. P. (2012). Old and new ideas for data screening and assumption testing for exploratory and confirmatory factor analysis. *Frontiers in Psychology, 3*(1), 55. https://doi.org/10.3389/fpsyg.2012.00055

Gudmundsdottir, G. B., & Brock-Utne, B. (2010). An exploration of the importance of piloting and access as action research. *Educational Action Research*, *18*(3), 359–372.

Keppell, M. (2014). Personalised learning strategies for higher education. In K. Fraser (Ed.), *The future of learning and teaching in next generation learning spaces* (pp. 3–21). Emerald Group Publishing Limited.

Kline, R. B. (2016). Principles and practice of structural equation modeling. Guilford Press.

Kuijpers, M., & Meijers, F. (2011). Learning for now or later? Career competencies among students in higher vocational education in the Netherlands. *Studies in Higher Education*, *37*(4), 449–467. https://doi.org/10.1080/03075079.2010.523144

Lilia, R., & Elena, T. (2019). Skills and competencies in higher education and beyond. *Journal of Language and Education*, *5*(4), 4–8. https://doi.org/10.17323/jle.2019.10186

McClelland, D. C. (1998). Identifying competencies with behavioral-event interviews. *Psychological Science*, *28*(1), 1–13. https://doi.org/10.1111/1467–9280.00

Organization for Economic Cooperation and Development [OECD] (2023a). *Skills*. Retrieved from https://www.oecd.org/skills/

Organization for Economic Cooperation and Development [OECD] (2023b). OECD *skills studies*. Retrieved from https://www.oecd-ilibrary.org/education/oecd-skills-studies_23078731

Partnership for 21st Century Skills. (2012). *Our history.* Retrieved from http://www.p21.org/about-us/our-history

Rieckmann, M. (2012). Future-oriented higher education: Which key competencies should be fostered through university teaching and learning? *Futures*, *44*(2), 127–135. https://doi.org/10.1016/j.futures.2011.09.005

Rychen, D. S., & Salganik, L. H. (2003). *Key competencies for a successful life and well-functioning society*. Hogrefe Publishing.

Shavelson, R. J. (2010). On the measurement of competency. *Empirical Research in Vocational Education and Training*, *2*(1), 41–63. https://doi.org/10.1007/BF03546488

Teijeiro, M., Rungo, P., & Friere, M. J. (2013). Graduate competencies and employability. *Economics of Education Review*, *34*(1), 286–295. https://doi.org/10.1016/j.econedurev.2013.01.00

Lepa Babić[2]
Univerzitet Singidunum

Razvoj i preliminarna validacija Skale za procenu osnovnih kompetencija za zapošljavanje (SPOKZ)

Apstrakt: Autori ranijeg perioda su osmislili okvir za prikaz osnovnih kompetencija za zapošljavanje radne snage u 21. veku. Taj okvir, međutim, nije korišćen za izradu personalizovanih obrazovnih planova unapređenja kompetencija studenata. U okviru ove studije je razvijena i validirana Skala za procenu osnovnih kompetencija za zapošljavanje (SPOKZ) kako bi se utvrdilo koje osnovne kompetencije treba da razviju studenti završnih godina kako bi bili zapošljivi u 21. veku. Uzorak je obuhvatio 521 studenta poslednje godine fakulteta, koji su ocenili meru u kojoj poseduju 24 osnovne kompetencije i meru u kojoj poslodavci cene te kompetencije. Razlike u tim dvema ocenama su doprinele utvrđivanju oblasti u kojima treba poboljšati osnovne kompetencije. U eksploratornoj faktorskoj analizi su 24 kompetencije grupisane u četiri faktora: veštine, kapacitet za promene, opšta pismenost i digitalna pismenost. Četvorofaktorska struktura skale je potvrđena. U studiji se iznosi zaključak da SPOKZ može da pomogne edukatorima da identifikuju osnovne kompetencije koje studenti treba da razviju pre no što se zaposle.

Ključne reči: osnovne kompetencije, radna snaga 21. veka, zapošljivost, personalizovani obrazovni planovi, obrazovanje usredsređeno na kompetencije

[2] Dr Lepa Babić je docentkinja na Univerzitetu Singidunum u Srbiji (lbabic@singidunum.ac.rs).

Uputstvo za autore priloga

Dostavljanje radova

Časopis publikuje radove koji nisu ranije objavljeni na drugom mestu. Radovi se dostavljaju redakciji isključivo u elektronskoj formi, na e-adresu: ipa.as@f.bg.ac.rs.

Format teksta

Tekstovi se dostavljaju u Word formatu, u obimu od 25.000 do 60.000 slovnih znakova, latiničkim pismom. Uz to je neophodno dostaviti i apstrakt rada u obimu do 1.000 slovnih znakova, tri do pet ključnih reči, kao i najvažnije podatke o autoru/ki rada, u obimu do 250 slovnih znakova. Neophodno je navesti trenutnu poziciju na kojoj se autor/ka nalazi, tj. instituciju ili organizaciju u kojoj je zaposlen/a, godinu rođenja (koja se ne objavljuje, već služi u svrhe katalogizacije) i e-adresu. Ukoliko rad ima više autora, za svakog pojedinačnog autora/ku treba navesti sve prethodno pomenute podatke. Sem naslova, rad može sadržati i dva nivoa podnaslova, koji se ne numerišu. Za sva isticanja i naglašavanja u tekstu koristiti kurziv (italic), ne koristiti podvlačenja i druge forme naglašavanja. Slike, tabele i grafičke prikaze označiti odgovarajućim brojem (arapskim) i naslovom koji ih jasno objašnjava i dostaviti ih u formatu pogodnom za štampanje.

Jezik

Radovi se dostavljaju na srpskom, engleskom, nemačkom, hrvatskom, bošnjačkom i crnogorskom jeziku, a jezici objavljivanja su srpski (kao i hrvatski, bošnjački, crnogorski) i engleski. Za tekstove na srpskom jeziku uredništvo obezbeđuje prevod apstrakata na engleski, a za tekstove na engleskom prevod apstrakata na srpski jezik.

Citiranje i literatura

Pozive na literaturu treba davati u tekstu, u zagradama, a fusnote koristiti samo kada je neophodno, npr. za komentare i dopunski tekst. Pri citiranju izvora (štampanih i elektronskih) i u bibliografiji koristiti isključivo APA stil (APA Citation Style – American Psychological Association). Detaljnije u: Publication Manual of the American Psychological Association, Seventh Edition (2020). Takođe videti na: http://www.apastyle.org/.

Na kraju rada navodi se spisak korišćene literature. Radovi se navode abecednim redom. Za tačnost citata i referenci odgovorni su autori.

Recenziranje

Rad recenziraju dva eksterna recenzenta. Recenzije su tajne. Recenzije se u propisanom formatu dostavljaju uredništvu. Na osnovu pozitivne recenzije urednici donose odluku o objavljivanju rada i o tome obaveštavaju autora/ku. O redosledu članaka u časopisu odlučuju urednici. Članci se razvrstavaju u sledeće kategorije: izvorni naučni radovi, pregledni radovi, stručni radovi. Časopis objavljuje i: prevode značajnih dokumenata (i, izuzetno, prevode članaka objavljenih na nekom drugom mestu), hronike, prikaze i kritike, intervjue i polemike, bibliografije i informacije o aktuelnim događanjima (skupovima, projektima, publikacijama) iz zemlje, regiona, Evrope i sveta.

Autorska prava

Notes for Contributors

Paper Submission

The journal publishes texts which haven't been published previously. Editorial Board receives only MS Word type electronic submissions sent to e-mail: ipa.as@f.bg.ac.rs.

Notes on style

All papers submitted should be between 25.000 and 60.000 characters (with spaces), in Latin letter. Abstract should also be submitted of no more than 1000 characters (with spaces), the title of the manuscript, as well as 3-5 keywords. Submissions should include: full name, institutional affiliation and position of the author; basic data on author (up to 250 characters with spaces) and the contact information, as well as the date of birth (will not be published, serve just for the catalogue). If there is more than one author, the information should be provided for each author. Articles should be structured using up to two levels of headings. Numbering should not be used in headings. Italic formatting is allowed for emphasizing. Bolding, underlining and other such formatting are not allowed. Figures, pictures and tables should be named and numbered by Arabic numerals, and supplied in a form suitable for reproduction.

Language

Serbian, English, German, Croatian, Bosnian and Montenegrinian languages are acceptable languages. Papers will be published in Serbian (as well as Croatian, Bosnian and Montenegrinian) and in English. For papers published in English additional abstract in Serbian will be provided by Editorial Board, while for papers published in Serbian additional abstract in English will be provided.

Quotations and References

References to literature should be placed in the text, within parentheses. It iss acceptable to use footnotes, however, it is recommended to use them only if necessary e.g. for comments and additional text. All quotations should be referenced using APA Citation Style (American Psychological Association). See: Publication Manual of the American Psychological Association, Seventh Edition (2020). See also http://www.apastyle.org/.

References in APA style should be listed alphabetically at the end of the paper. It is the contributor's responsibility to ensure that all references and citations are correct.

Reviews

Submitted manuscripts are subject to peer review by two external reviewers at the discretion of the Editorial Board. Reviews are confidential (anonymous peer reviews). Papers which receive positive reviews are published, and authors are informed beforehand. The editors determine the order of articles. Reviewed articles are categorized as follows: original scientific articles, review articles, professional articles. The journal publishes also translation of relevant documents (or, exceptionally, translation of papers published elsewhere), chronicles, scientific reviews, polemics and interviews, bibliographies, information about current projects, events and publications in the national, European and global adult education and learning field.

Copyright

Andragoške studije, issn 0354–5415, broj 11, decembar 2023, str. 155–156

Lista recenzenata

dr Antonia Batzoglou
Univerzitet u Londonu, Ujedinjeno Kraljevstvo

dr Dragan Bulatović
Univerzitet u Beogradu, Srbija

dr Sanja Đerasimović
Univerzitet u Eksiteru, Ujedinjeno Kraljevstvo

dr Hajdana Glomazić
Institut za kriminološka i sociološka istraživanja, Srbija

dr Barry Golding
Federativni univerzitet Australije, Australija

dr Maurice de Greef
Univerzitet Vrije u Briselu, Belgija

dr John Henschke
Univerzitet Lindenvud, Sjedinjene Američke Države

dr Joanna Ostrouch-Kamińska
Univerzitet Varmije i Mazurije u Olštinu, Poljska

dr George Koulaouzides
Helenski otvoreni univerzitet, Grčka

dr Milica Marušić
Institut za pedagoška istraživanja, Srbija

dr Miloš Milenković
Univerzitet u Beogradu, Srbija

dr Miljana Milojević
Univerzitet u Beogradu, Srbija

dr Alison Laurie Neilson
Univerzitet u Koimbri, Portugalija

AS Andragoške studije, issn 0354–5415, broj 11, decembar 2023, str. 157–158

List of Reviewers

dr Antonia Batzoglou
University of London, United Kingdom

dr Dragan Bulatović
University of Belgrade, Serbia

dr Sanja Djerasimović
University of Exeter, United Kingdom

dr Hajdana Glomazić
Institute of Criminological & Sociological Research, Serbia

dr Barry Golding
Federation University Australia, Australia

dr Maurice de Greef
Vrije Universiteit in Brussels, Belgium

dr John Henschke
Lindenwood University, United States of America

dr Joanna Ostrouch-Kamińska
University of Warmia and Mazury in Olsztyn, Poland

dr George Koulaouzides
Hellenic Open University, Greece

dr Milica Marušić
Institute for Educational Research, Serbia

dr Miloš Milenković
University of Belgrade, Serbia

dr Miljana Milojević
University of Belgrade, Serbia

dr Alison Laurie Neilson
University of Coimbra, Portugal

CIP – Каталогизација у публикацији
Народна библиотека Србије, Београд

37.013.83(497.11)

ANDRAGOŠKE studije : časopis za proučavanje obrazovanja i učenja odraslih = Andragogical Studies : Journal for the Study of Adult Education and Learning / urednici Miomir Despotović, Katarina Popović. – God. 1, br. 1/2 (apr./okt. 1994)– . – Beograd : Institut za pedagogiju i andragogiju, 1994– (Beograd : Službeni glasnik). – 24 cm

Dva puta godišnje. – Tekst na srp. i engl. jeziku. – Drugo izdanje na drugom medijumu: Andragoške studije (Online) = ISSN 2466-4537

ISSN 0354-5415 = Andragoške studije

Andragogical Studies
Andragogical Studies is a scholarly peer-reviewed journal, devoted to theoretical, historical, comparative and empirical studies in adult and continuing education, lifelong and lifewide learning. The journal reflects ideas from diverse theoretical and applied fields, addressing the broad range of issues relevant not only for Serbia, but also for the whole of Europe, as well as for the international audience. The journal publishes research employing a variety of topics, methods and approaches, including all levels of education, various research areas – starting with literacy, via university education, to vocational education, and learning in formal, non-formal and informal settings.

Publisher
Institute for Pedagogy and Andragogy, University of Belgrade, Faculty of Philosophy
Postal address: Čika-Ljubina 18–20, 11000 Belgrade
E-mail: ipa.as@f.bg.ac.rs, Telephone number: 00381-11-3282-985.

Print ISSN: 0354–5415
Online ISSN: 2466-4537
UDK: 37.013.83+374

Design: Zoran Imširagić
Typesetting: Irena Đaković
Prepress: Dosije studio, Belgrade
Proofreading: Irena Popovič
Proofreading for English language: Tamara Jovanović

Andragogical Studies was launched in 1994, and since 2002 the journal is published twice annually. Resposible for the editing policy is the **Institute for Pedagogy and Andragogy** (University of Belgrade, Faculty of Philosophy), Čika-Ljubina 18–20, 11000 Belgrade, in cooperation with **Adult Education Society**, Garsije Lorke 9, 11060 Belgrade. The journal publishing is supported by the Ministry of Education, Science and Technological Development of Republic of Serbia.

Catalogue: National Library of Serbia

Andragogical studies is categorized as the journal of an international significance by the decision of the Ministry of Education, Science and Technological Development of Republic of Serbia (M24). Andragogical studies is an open access journal, established as the journal of international authorship within European Reference Index for the Humanities and Social Sciences (ERIH PLUS).

Indexing: National Library of Serbia (Belgrade); Serbian Library Consortium for Coordinated Acquisition (kobson.nb.rs); Serbian Citation Index (http://scindeks.ceon.rs); European Reference Index for the Humanities and Social Sciences (ERIH PLUS) (https://dbh.nsd.uib.no/publiseringskanaler/erihplus/); Library of the German Institute for Adult Education DIE, Bonn.

1838