International Journal of Lifelong Education

ISSN: 0260-1370 (Print) 1464-519X (Online) Journal homepage: www.tandfonline.com/journals/tled20

Equity and social exclusion measures in EU lifelong learning policies

Elena Tuparevska, Rosa Santibáñez & Josu Solabarrieta

To cite this article: Elena Tuparevska, Rosa Santibáñez & Josu Solabarrieta (2020) Equity and social exclusion measures in EU lifelong learning policies, International Journal of Lifelong Education, 39:1, 5-17, DOI: 10.1080/02601370.2019.1689435

To link to this article: https://doi.org/10.1080/02601370.2019.1689435

INTERNATIONAL JOURNAL OF LIFELONG EDUCATION
2020, VOL. 39, NO. 1, 5–17
https://doi.org/10.1080/02601370.2019.1689435

Routledge
Taylor & Francis Group

ARTICLE

OPEN ACCESS Check for updates

Equity and social exclusion measures in EU lifelong learning policies

Elena Tuparevska, Rosa Santibáñez and Josu Solabarrieta

Faculty of Psychology and Education, University of Deusto, Bilbao, Spain

ABSTRACT

The aim of this article is to examine how EU lifelong learning policies are trying to reach the vulnerable by looking at what measures against social exclusion they offer and how equitable these measures are. It is a qualitative study that focuses on policy documents that form the European Union's legal and political frameworks of reference in the lifelong learning area since 1992. The document analysis has been complemented by semi-structured interviews with EU lifelong learning experts. The findings show that early school leavers and migrants are the main target groups in the policies, leaving many other groups at risk of being excluded from learning opportunities. There is not enough attention to measures addressing wider social phenomena. There is also an overemphasis on basic skills which are understood in a very narrow way as literacy and numeracy when referring to the vulnerable. We argue that a greater variety of measures as well as better targeted measures are needed to address the multiple and complex needs of the vulnerable. Such measures would allow a broader understanding of lifelong learning where those that are hardest to reach are offered learning opportunities independent of their personal and social circumstances

KEYWORDS

Equity; social exclusion measures; lifelong learning; vulnerable groups; EU

Introduction

In the second half of the 1990s there was a significant shift in the European discourse of equality as the concept of social exclusion started to be emphasised, reflecting the increased problem of unemployment the European Union (EU) was facing at that time (Brine, 1998). The assumption that poverty had almost disappeared started to be questioned and social exclusion emerged as a dominant concept in EU social policy (Atkinson & Davoudi, 2000). Dating back to the Enlightenment era, the European discourse of equality centred on equal opportunities and the individual until social exclusion offered a multi-deprivational model of inequality and disadvantage and shifted the focus away from individual blame and onto disadvantaged social groups (Brine, 1998). Thus, education and training policy became focused on the vulnerable such as the low-skilled, the unemployed, the young unemployed and the less educated (Brine, 1998).

Although these groups have become a policy focus, the participation rates of vulnerable groups continue to be low. Evidence from the Programme for the International Assessment of Adult Competencies (PIAAC) has shown that older adults, under educated adults, those with lower levels of functional literacy, and adults with lower socioeconomic status participate in adult education at much lower rates (Desjardins, 2015). This suggests that adult education and lifelong learning policies are failing to target those who are most in need of learning opportunities, reaching instead those who already are well educated and who have higher socioeconomic status. Such inequality in outcomes is often referred to as the Matthew effect, the tendency of government spending to end up

CONTACT Elena Tuparevska elena.tuparevska3@deusto.es Faculty of Psychology and Education, University of Deusto, Avenida de las Universidades, 24, Bilbao 48007, Spain

in the hands of those who already have resources such as the middle- and upper-classes, and not in the hands of the disadvantaged (Bonoli & Liechti, 2018). Le Grand´s (1982) analysis of the *General Household Survey* on the amount of public expenditure spent on different types of households identified the Matthew effect in social services in Britain noting that ´almost all public expenditure on the social services in Britain benefits the better off to a greater extent than the poor . . . As a result equality, in any sense of the term, has not been achieved´ (p. 3–4). Le Grand (1982) found that there is inequality in use, access, opportunities, and outcomes, especially in education where 50 percent more public expenditure went to the higher socioeconomic groups. Moreover, the neoliberal reforms of the past decades have sought to curb government intervention and reduce the welfare state. Deregulation and privatisation have had a disproportionate effect on the most vulnerable – plunging them into poverty and limiting their access to basic rights.

The lack of highly paid jobs and the decrease of earnings and living standards across Europe has brought about an increased competition between social groups (Riddell, Weedon, & Holford, 2014). Any attempts to tackle inequality and take away the advantages of the more privileged groups are likely to encounter resistance (Riddell & Weedon, 2014; Tawney, 1931 (1938)). Within the EU there is a strong pressure from the middle class who are trying to preserve their advantages (Riddell & Weedon, 2014). Therefore, it is imperative that governments put in place strategies that ensure that vulnerable groups have access to lifelong learning opportunities.

The aim of this article is to examine how EU lifelong learning policies are trying to reach the vulnerable by looking at what measures and policy responses against social exclusion they offer to these groups and how equitable these measures are. Since the 1993 *White Paper on Growth, Competitiveness and Employment* which remarks on ´the tragedy of social exclusion and marginality´ (CEC, 1993, p. 117), EU lifelong learning policies have been aimed at tackling social exclusion. How they are trying to attempt that is not often clear. Looking at how EU policy on education addresses the social exclusion of vulnerable groups, Carrera and Geyer (2009) found that while most of the policies emphasise the importance of education in overcoming social exclusion and improving the situation of vulnerable groups, they rarely specify concrete policy measures to tackle it and to ensure the success of the policy. The few measures within compulsory education systems that can be found in the EU policies include: high-quality pre-school education, language learning, social adjustment support, flexible education systems, mother-tongue learning modules for children of migrants, integrating those with disabilities into mainstream schooling, teacher training, and avoiding early tracking and school decentralisation (Carrera & Geyer, 2009). Since this information is lacking about the field of lifelong learning policy, this article aims to close the gap.

From equality to equity

There has been a focus on equity over equality in education in recent years. Sen's (1992) question ´equality of what?´ has made a strong argument for moving beyond the concept of equality. Equality is no longer seen as the aim of education policy as the state of everyone being the same or accomplishing the same results is not considered to be either possible or desired (Levin, 2003). Instead, embracing the concept of equity which is closely connected to social justice and fairness does not allow that personal and social circumstances such as gender, socio-economic status or ethnic origin impede educational success (Field, Kuczera, & Pont, 2007). Even the standard definition of the English word 'equity' entails being equal and fair (Unterhalter, 2009). However, while it is generally accepted that equity is a more fair approach to education, there is no generally agreed definition of the concept. Nevertheless, although it is difficult to define what equity is, ´we know when we are far from it´ (Levin, 2003, p. 5).

The United Nations has played an important role in promoting equity in education. Key documents such as the 1948 *Universal Declaration of Human Rights*, the *Convention Against Discrimination in Education* in 1960, the 1989 *Convention on the Rights of the Child* paved the way to starting a conversation on educational equity, while the 1990 *World Declaration on*

Education for All and the 2000 *Dakar Framework for Action* upheld equity as a cornerstone of education (UNESCO Institute for Statistics, 2007). The *Incheon Declaration*, adopted in 2015, reaffirmed the importance of equity for a renewed education agenda (UNESCO, 2015). The OECD is another international organisation that has had a long-standing interest in the concepts of equity and equality dating back to the 1960s and 70s (Istance, 1997). The OECD has understood equity in four different ways: equity of access or equality of opportunity, equity in terms of learning environment or equality of means, equity in production or equality of achievement (or results), and equity in using the results of education (Demeuse, Crahay, & Monseur, 2001). However, the OECD ´s policy treatment of equity has mainly focused on specific target groups or priority concerns for particular sectors of education and training, and it has been more practically orientated with emphasis placed on the exchange and review of policies and practices (Istance, 1997).

Equity has been an important concept in the EU as well. A number of documents tackling equity were issued in the 2000s. The 2006 *Communication on Efficiency and Equity in European Education and Training Systems* defined equity as:

> the extent to which individuals can take advantage of education and training, in terms of opportunities, access, treatment and outcomes. Equitable systems ensure that the outcomes of education and training are independent of socio-economic background and other factors that lead to educational disadvantage and that treatment reflects individuals' specific learning needs (CEC, 2006b, p. 2).

The fact that individuals do not begin life with equal opportunities was acknowledged and equity was chosen over equality as a fairer and more realistic policy approach that can redress the effects of inequality and give access to disadvantaged groups to quality education and training (CEC, 2006a). The hidden costs of inequity began to be emphasised (CEC, 2006a; CEU, 2006; Council of the European Union and Commission of the European Communities, 2008). Following the work of the United Nations and the EU, our concept of equity is concerned primarily with fairness, as we recognise that individuals do not begin life with equal opportunities due to personal and social circumstances, and therefore we regard the education of all learners as equally important.

Thus, the question of equity is fundamental when addressing the issue of vulnerability and vulnerable groups as the poor face more risks and shocks and can adapt less to change than the well-off (UNDP, 2014). While education can have a positive effect on the situation of vulnerable groups such as migrants and ethnic minorities and can help them get ahead in society, it can also contribute to certain dynamics of economic, political or social discrimination (Santibañez et al., 2005). Thus, the concept of equity is especially important when we talk about social exclusion and the vulnerable in education since equity in education has to do with redistribution and improving the situation of disadvantaged groups (Maiztegui-Oñate & Santibáñez-Gruber, 2008). While on one hand equity implies treating equals equally and ensuring that all members of a group with similar needs benefit from equal treatment, on the other hand it also implies not treating unequals equally and positively discriminating against some groups in order to compensate for the inequity they face (UNESCO, 2014). The state has a responsibility to provide all with the same opportunities regardless of their personal and social circumstances. However, this responsibility has often been downplayed. In order to rectify this, our study aims to move from an individualistic to a more social and systemic understanding of vulnerability. Although vulnerability is a contested concept, drawing on Virokannas, Liuski, and Kuronen (2018) we understand vulnerability as a complex concept that has temporal, situational, relational, and structural dimensions, highlighting in particular the role of society and its social processes, institutions, and welfare service system in reproducing or reducing vulnerability.

Research shows that equity is an important concept in adult education and lifelong learning as well. Boyadjieva and Ilieva-Trichkova (2017) argue that equity is a key dimension to widening access to adult education, and that adult education has a potential to influence educational inequalities by providing some opportunities for catching up for the unemployed or the low skilled.

In order for lifelong learning to be able to foster equity, it is important to put in place measures targeted at vulnerable groups. According to Brine (1998, p. 150) ′the effectiveness of the equality discourse depends upon visibility, possibility, believability and credibility′. The same can be argued about equity. It is not enough only to talk about fighting social exclusion in lifelong learning policies, the visibility of the equity discourse can be best provided by putting in place concrete policy measures.

In order to develop an equity framework to analyse the policy measures in EU lifelong learning policies we started off with Berne and Stiefel (1984) four guiding questions about equity: who, what, how and how much? These four questions constitute the framework developed by Berne and Stiefel (1984) for measuring equity of school finance, but they can easily be applied to broader analyses of equity in education (UNESCO Institute for Statistics, 2007). In order to answer these questions in the area of the EU lifelong learning policy we drew on Levin's (2003) work on approaches to equity in policy for lifelong learning. In order to answer the question ′who?′ we looked at the targets of the policy measures which can range from youth, migrants, women, the elderly, older workers, persons with disabilities, etc. To answer ′what?′ and ′how?′, we used the taxonomy outlined by Levin (2003) for thinking about the range of measures that countries can adopt in trying to improve equity in lifelong learning. As can be seen in Table 1, policy measures can be directed at 3 goals: 1) encouraging individual participation, 2) changing institutional delivery systems and methods, and 3) changes aimed at broader social phenomena (Levin, 2003). Finally, to answer the question ′how much?′ we focused on Levin′s (2003) second dimension of equity which refers to whether overall levels of provision are sufficient and of the right kind.

Methodology

A total of 59 EU policy documents were analysed. The documents were selected based on 3 criteria: that they refer to lifelong learning, that they are issued by the European Commission, the Council of the European Union, or the European Parliament, three institutions that were identified beforehand as the main policy making bodies with the EU, and lastly, that they were issued between 1992 and 2017. The year 1992 was taken as a starting point as the year of the *Treaty on European Union* (TEU, also called *Maastricht Treaty*) which provided for the first time an explicit legal basis for education, extended the competencies of the EU, encouraged cooperation between member states in the field of education, and marked the beginning of lifelong learning initiatives (Ertl, 2006).

The documents were divided into three periods: pre-Lisbon, post-Lisbon, and post-Europe 2020. While only a few documents belong to the first period (8), the majority come from the second and third period (27 and 24 respectively). The three periods were chosen because they seem to demonstrate significant shifts in the EU education and training policy. The Lisbon strategy can be regarded as a turning point in the development of an EU policy model in education and training as it considerably extended the legal basis for EU activities by intergovernmental agreements, it promoted more cooperation between member states resulting in the creation of a European educational space, and it prompted more coordinated action in lifelong learning (Ertl, 2006). However, after the economic crisis it became evident that the Lisbon strategy was not yielding the results it had set out to accomplish and a new strategic framework for cooperation in education and training in the EU was adopted (Panitsides & Anastasiadou, 2015). Europe 2020 introduced a shift in the Commission′s view on the concept of lifelong learning ′as a fundamental principle underpinning the entire framework′ and it made lifelong learning one of its four main objectives (CEU, 2009, p. C 119/3).

The document analysis was complemented by 6 semi-structured interviews with policy experts from organisations and institutions that focus on lifelong learning and that play a role in designing EU policies (see Table 2). The preliminary selection of potential interviewees was based on an analysis of the reports on the results of the stakeholder consultations at the European Commission on various lifelong learning initiatives that were available online, as well as the lists of members in lifelong learning working groups at the Commission. Experts in the field of lifelong learning were

Table 1. Policy measures in lifelong learning.

POLICY MEASURES		
Measures encouraging individual participation	Support services	Guidance and counselling Mentorship and tutorship Academic preparation programmes Other
	Financial incentives	Direct subsidies to take part in education Scholarships Grants Loans Tuition reductions Living allowances Travel allowances Tax incentives Other
	Non-financial incentives	Social assistance support linked to participation in education or training programmes Training or study leave Other
	Advertising and recruitment	Advertising through media Advertising through other channels Earmarked places for different groups Using learners to recruit hard-to-reach groups Other
Measures aimed at changing institutional delivery systems and methods	Creating new delivery agents	New kinds of institutions New delivery vehicles based in existing institutions Partnerships between public, non-profit and private sector Other
	New modes of delivery	Distance learning Delivery in workplaces Delivery in remote communities Part-time Modular Other
	Programmes	Basic skills programmes VET programmes Other programmes
	Changes in admissions	Prior learning recognition Preferential admissions for certain target groups Mature student status Other
	New modes of financing	Government funding Employer funding Individual funding Funding by ESF Funding by YEI Funding by Erasmus + Other
	New credentials	
Measures aimed at broader social phenomena	Providing related services for learners	Housing Child care Other cross sectoral cooperation
	Legal measures to reduce discrimination	

Source: Prepared by the authors based on Levin (2003).

Table 2. Interviews conducted by type of organisation.

Organisation	Interviewees
EU institution	2
International organisation	1
Non-governmental organisation	3

Source: Prepared by the authors.

also consulted. In this way, we identified the key players in EU lifelong learning policy. We originally set out to interview eight experts. Since not all the people we wanted to interview were available, we had to amend our preliminary list and had to allow the selection of interviewees to emerge organically in the interviewing process by seeking recommendations from the interviewees. Eventually, six interviews were conducted in order to contrast with the policy experts the initial analysis of the documents. Two of the experts worked at the European Commission, and the other four worked at other organisations that focus on lifelong learning, one of which is an international organisation and the rest operate at the EU level. The preparations for the interviews began in 2017, and the interviews were conducted from January to June 2018. Five of the interviews were conducted in English, and one in Spanish at the request of the interviewee. According to the objectives of the research, the questions of the interview were organised around the theme of policy measures against social exclusion. Content analysis was used to analyse the policy documents and interviews. Some of the codes were established beforehand drawing on the work of Levin (2003) on the approaches to equity in policy for lifelong learning, while others emerged from the data during the analysis. Thus, both inductive and deductive approaches have been used.

Results and discussion

Early school leavers and migrants as main target groups

The analysis shows that most measures are aimed at early school leavers. They are present throughout the three periods and they are offered a wide range of measures ranging from second chance schools and opportunities to high quality early childhood education and care. Early school leavers are followed by migrants. Although some of the policy responses aimed at migrants are very vague such as ´using the potential of migrants´ in the 2008 *Joint Report* (Council of the European Union and Commission of the European Communities, 2008, p. C 86/7), they are present throughout the second and third periods, and the most common measure proposed for this group is learning the host country language.

Measures aimed at other three groups, the low-skilled, those with special needs and the elderly, appear in some of the policies but with much less frequency than the other two groups, the early school leavers and migrants. Although the 1993 *White Paper* (CEC, 1993) calls for prioritising preventive measures for the low-skilled, during the first two periods they are offered only second chance education. It is only in the third period after 2010 that the low-skilled are offered other measures.

Measures for people with special needs appear in the second and third period, and they are offered a range of different measures. Measures for the elderly also appear in the second and third period. The *Education and Training Monitor 2014* (European Commission, 2014) argued that participation in lifelong learning is particularly important for older people, and that the older population is one of the groups with lowest skill levels and the lowest participation levels in adult learning. The participation of older people was also a subject of concern in several of the interviews. However, only a few measures are offered for this target group: inter-generational learning,

volunteering, as well as increasing the participation of older people in higher education as a way of ensuring active ageing and social inclusion.

In their analysis of active labour market policies and their ability to reach the most disadvantaged, Bonoli and Liechti (2018) argued that policies which are targeted explicitly on the disadvantaged are less likely to have a Matthew effect. However, apart from these five targeted groups, the majority of the measures in the EU policies are aimed at vulnerable groups in general and not on specific and well defined groups. According to Castel (2008), defining under the same categories groups such as the long-term unemployed or young job seekers means disregarding the fact that they have very different life trajectories and defining them only based on something negative, on something they lack. It also signifies simplifying the problem and ignoring the fact that many vulnerable people struggle with multiple vulnerabilities. Depicting vulnerability in collective terms can lead to concealing the other kinds of vulnerabilities individuals face (Mustaniemi-Laakso et al., 2016; Peroni & Timmer, 2013). Rosengard, Laing, Ridley, and Hunter (2007) have identified a wide range of people as having multiple and complex needs such as people with mental health problems, people with disabilities, young and older people, those fleeing abuse and violence, minorities and ethnic groups, people with dual diagnosis of mental health issues and substance misuse, or other medical conditions, people with challenging behaviours, and those who are far from services due to poverty, poor housing, or rural locations. The different vulnerabilities adults struggle with were highlighted by one of the interviewees:

> … there was divide in the family, they were broke, they had no money, no reserves for buying things for the course, they had to pay for the transport for the course. So a lot of things, when they were ill they had to pay the medicine themselves … they could not recover quickly for the course, they were away instead of one week, two or three ill, and when the children were ill they had nobody to look after them so they had to interrupt the course. So there were a lot of external problems they had to solve. (Interviewee 6)

Ranging from health to social issues such as education, many people have to deal with different interlocking needs in their lives and require a personalised, not a one-fit-all response from services (Rankin & Regan, 2004). Since social exclusion policies have not been successful in reaching those groups that are the most disadvantaged and the most difficult to reach, it is important to incorporate the concept of complex needs in the social exclusion agenda and thus acknowledge the interconnected nature of people's needs instead of treating them in isolation (Rankin & Regan, 2004). Furthermore, missing from the lifelong learning policies is the recognition of the influence of the specific socioeconomic, institutional and cultural contexts that characterise the different welfare regimes across the EU (Walther, 2006).

Overemphasis on basic skills

By far the most common measure offered to the vulnerable throughout the three periods is developing basic skills. The 1995 *White Paper on Education and Training* stresses the need to focus on disadvantaged groups as ´it is becoming increasingly clear that those not integrated into society should receive special attention, so as to give them basic skills, and cultivate fundamental values´ (CEC, 1995, p. 27). Basic skills are also an often repeated measure in the second and third period especially when referring to the low-skilled and early school leavers.

We see an especially strong focus on basic skills in the last few years with the 2016 *New Skills Agenda for Europe* (European Commission, 2016) and the 2016 *Council Recommendation on Upskilling Pathways: New Opportunities for Adults* (CEU, 2016). This recent emphasis on basic skills can be connected to the introduction of PIAAC by the OECD. Introduced in 2008 and having published its first results in 2013, PIAAC has had an important influence on lifelong learning policy:

> One of the impacts that we see long term is that with the result of PIAAC which came out some years ago there is now a much larger perception of the large scale of the problem of low basic skills. I think people didn't expect that the numbers of people with low basic skills was that high. In a way that has now driven the understanding that this needs to be tackled. There is now a much larger perception about the need to do something (Interviewee 1)

Although a stronger focus on basic skills would help solve this problem, it could also mean changing and reshaping lifelong learning itself. It could lead to a much narrower understanding of lifelong learning as it becomes a synonym for basic skills. In their analysis of the English national basic skills strategy, Appleby and Bathmaker (2006) found that the lifelong learning discourse is overshadowed by the basic skills discourse and becomes an afterthought in policies, thus perpetuating inequality. As funding goes to prioritised areas such as employability skills for young people, opportunities for other forms of adult learning are decreasing, and new sites of inequality are created which affect in particular hard-to-reach groups (Appleby & Bathmaker, 2006). Furthermore, an overemphasis on basic skills could lead to shifting the focus back to individual blame. Instead of trying to tackle the systemic factors that lead to disadvantage, the policies construct the vulnerable themselves as the problem.

Not only is the focus on basic skills reshaping and narrowing down the objective of lifelong learning, it is also narrowing down the understanding of basic skills. While there is a tendency in the EU policies to broaden the list of basic skills by moving beyond just the traditional skills of literacy and numeracy, this has not been the case when referring to the vulnerable. The Lisbon strategy (CEU, 2000) introduced the notion of new basic skills and defined them as IT skills, foreign languages, technological culture, entrepreneurship and social skills. The *Memorandum on Lifelong Learning* (CEC, 2000) said that the list provided in the Lisbon strategy was not exhaustive, and it defined new basic skills ´as those required for active participation in the knowledge society and economy – in the labour market and at work, in real-time and in virtual communities and in a democracy, and as a person with a coherent sense of identity and direction in life´ (CEU, 2000, p. 10–11). It also included self-confidence, self-direction and risk-taking among social skills, and it added skills such as learning how to learn, learning to adapt to change, and learning to make sense of vast quantities of information. The report *The Concrete Future Objectives of Education and Training Systems* offered a similar definition of basic skills, and expanded further the list of basic skills adding ´the vocational and technical skills, as well as social and personal competencies, including awareness of arts and culture, which enable people to work together and be active citizens´ (CEU, 2001, p. 8).

Although some of the policy documents acknowledge the need to take into account all the basic skills and all the key competences such as the *Recommendation on Key Competences for Lifelong Learning* which states that ´the key competences are all considered equally important, because each of them can contribute to a successful life in a knowledge society´ (European Parliament & Council of the European Union, 2006, p. L 394/13), when referring to vulnerable groups the policy documents narrow down these skills and competences focusing only on few of them. We often see the vulnerable being offered only the traditional basic skills such as literacy and numeracy.

When talking about the disadvantaged the 2010 *Joint Progress Report* states that more focus is needed on literacy as ´inadequate literacy levels, particularly among boys and migrants, are a serious obstacle to their prospects for jobs and well-being´ (Council of the European Union and Commission of the European Communities, 2010, p. C 117/3). The *Council Resolution on a Renewed European Agenda for Adult Learning* (CEU, 2011) stresses literacy and numeracy for the low-skilled. While the communication *Rethinking Education: Investing in Skills for Better Socio-Economic Outcomes* (European Commission, 2012) emphasises the need to develop transversal skills since ´modern, knowledge-based economies require people with higher and more relevant skills´ (p. 3), vulnerable groups such as early school leavers and the low-skilled are offered literacy, numeracy, basic maths and science. The *New Skills Agenda for Europe* suggests to ´where possible – develop a wider set of skills leading to an upper secondary education qualification´ (European Commission, 2016, p. 5), but it is again literacy, numeracy and digital skills that is on offer for the low-skilled.

Although all the interviews stressed the importance of basic skills for tackling social exclusion, they also revealed the need to move beyond traditional basic skills. Life skills that allow a person to understand and have access to health, as well as to understand and manage finances, are crucial. Furthermore, according to Borg and Mayo (2004), the EU discourse on basic skills is labour-market

oriented and lacking Freire´s concept of critical literacy which allows one to read the world. By focusing more and more on traditional basic skills such as literacy and numeracy, the EU policies are neglecting other key skills that would allow the vulnerable to be critical and active citizens. While in the past the main aim of adult education was the democratic empowerment of citizens, nowadays neoliberalism is reshaping adult education by valuing vocational education and innovation above knowledge and understanding and by empowering people ´only as consumers, entrepreneurs of their own selves conceived as minibusinesses´ (Holford, Milana, & Špolar, 2014, p. 273). An emphasis on critical literacy will not only ensure democratic empowerment, but could also make the discourse of basic skills less individualistic and competitive (Borg & Mayo, 2004).

Concluding remarks: equity in lifelong learning

While the proposed measures in EU lifelong learning polices encourage to some extent individual participation, changes in the institutional delivery systems and methods, and changes of broader social phenomena, they are not enough to fight the growing inequality. We argue that a greater variety of policy measures are needed in order to better address equity and the needs of the vulnerable. A greater diversity of policy measures such as for example providing better services, a greater cross sectoral cooperation, financial and non-financial incentives, advertising, creating new programmes, creating new delivery systems, as well as better targeted policies would allow for more equitable lifelong learning systems in the EU.

The official EU discourse on social exclusion especially downplays the role of broader social phenomena. In its fight against social exclusion, the EU focuses mostly on the micro (individual) and meso (institutional) levels, and neglects the macro level (society). Neglecting the broader social phenomena is especially worrying in view of the wider EU context of social exclusion. Eurostat data shows that the statistical indicators of poverty and social exclusion (AROPE) have not significantly improved since the launch of Europe 2020. In fact, the AROPE rate has increased in several EU countries, particularly in Greece, Italy and Luxembourg (See Table 3). By downplaying broader social phenomena, EU lifelong learning policy overlooks key arguments of the *European Semester Factsheet on Inequalities* (European Commission, 2017) which highlights the potential of well-designed taxation systems and the provision of quality social services as important ways to tackle inequality.

Moreover, the current emphasis on basic skills is reshaping lifelong learning as we begin to understand it in a very narrow way as a synonym for basic skills, and it also threatens to create more inequality. While tackling social exclusion cannot be imagined without providing those who are excluded with basic skills, basic skills have to be only the first step. Not going beyond basic skills would create a sharp division between what Brine (2006, p. 655) calls the high knowledge-skills lifelong learner and the low knowledge-skills lifelong learner who is constructed as an ´individualised, pathologised´ learner with specific learning needs such as basic skills, and who is offered basic-skills and low-skill training programmes. Being only given the opportunity to develop basic skills means that these groups cannot move beyond low-paid, insecure jobs, thus perpetuating a cycle of exclusion and poverty. They are Standing´s (2011) precariat, a new class that ends up in precarious, low-paid or exploitative forms of work lacking fair working conditions. The existence of

Table 3. EU countries where number of people at risk of poverty or social exclusion has risen.

	2010	2011	2012	2013	2014	2015	2016	2017
Estonia	21,7	23,1	23,4	23,5	26,0	24,2	24,4	23,4
Greece	27,7	31,0	34,6	35,7	36,0	35,7	35,6	34,8
Spain	26,1	26,7	27,2	27,3	29,2	28,6	27,9	26,6
Italy	25,0	28,1	29,9	28,5	28,3	28,7	30,0	28,9
Cyprus	24,6	24,6	27,1	27,8	27,4	28,9	27,7	25,2
Luxembourg	17,1	16,8	18,4	19,0	19,0	18,5	19,8	21,5
Netherlands	15,1	15,7	15,0	15,9	16,5	16,4	16,7	17,0

Source: Eurostat [ilc_peps01].

an entire class that are permitted to become collateral victims is one of the most pressing dimensions of social inequality:

> I am sure, however, that the explosive compound of growing social inequality and the rising volume of human suffering relegated to the status of 'collaterality' (marginality, externality, disposability, not a legitimate part of the political agenda) has all the markings of being potentially the most disastrous among the many problems humanity may be forced to confront, deal with and resolve in the current century (Bauman, 2011)

However, basic skills are not only the predominant policy measure, but they are also understood in a very narrow way when referring to the vulnerable. While there has been a general tendency since 2000 to broaden the list of basic skills, in reference to the vulnerable basic skills are often understood as literacy and numeracy. In the face of growing social inequality, it is important to broaden the understanding of basic skills for the vulnerable by moving beyond traditional basic skills and including life skills, as well as Freire´s concept of critical literacy which allows one to read the world, to be critical and active citizen, and ensures that the main aim of adult education is the democratic empowerment of citizens.

Furthermore, a greater variety of measures are needed to tackle the cumulative disadvantages the vulnerable often face. These multiple disadvantages not only impede their participation but can also affect their social inclusion. In their study on the potential of adult education to enhance the social inclusion of vulnerable adults, De Greef, Verté, and Segers (2012) found that life circumstances (family life, health, housing, finances, economical status, satisfaction, happiness, psycho-social structures, and a sense of belonging) are a particularly important variable to boost the transfer aiming to increase social inclusion. It is therefore important to address their multiple and complex needs which are interconnected and require personalised and well-coordinated, cross-sectoral measures. Integrated social services that provide support together with other public services such as education, employment and health play a vital role in reaching out to the vulnerable (Lara Montero, van Duijn, Zonneveld, Minkman, & Nies, 2016).

Finally, there is a need for better targeting the lifelong learning policies and the measures prescribed. Currently, there are only few vulnerable groups that are offered specific measures for tackling social exclusion. Early school leavers and migrants are the main target groups in the policies, while less frequently found groups are the low-skilled, those with special needs and the elderly. Hence, there are different groups that are kept outside and are at risk of being excluded from learning opportunities. By not being offered specific measures, other groups that are also more prone to vulnerability such as for example the unemployed, Roma, people living in rural or remote areas, single parents, the homeless, or ex-offenders, may encounter different barriers and may be unable to participate in lifelong learning, thus perpetuating the Matthew effect which emerged as a major challenge in several of the interviews. According to one of the interviewees, it is white, well-educated, healthy men between the age of 30 and 40 who participate in lifelong learning, and not the vulnerable:

> Someone said if we put it all together – white male between 30 and 40 who get . . ., who had it all it seems, who are in no way disadvantaged and everybody else . . . I forgot to say healthy, well-educated white men. In fact, all the statistics about learning say yes, they get most of the training, they have the easiest access to lifelong learning. Isn´t this crazy . . . (Interviewee 6)

Statistics also show that lifelong learning policies are failing to target those most in need of education, as government spending goes to those with resources. Better targeted policies and measures can ensure access to those who usually don't participate, thus promoting social justice and fairness, and fighting against the Matthew effect.

Disclosure statement

No potential conflict of interest was reported by the authors.

Funding

This research was undertaken within the ENLIVEN project, and was supported by the European Union (EU), Horizon 2020 research and innovation programme under grant agreement [No. 693989]; and the European Union's Horizon 2020 research and innovation programme under the Marie Sklodoska-Curie grant agreement [No. 665959].

Notes on contributors

Elena Tuparevska is currently working at the University of Deusto as a Marie Curie Cofund fellow on the Horizon 2020 project entitled ENLIVEN. She has an MA in Lifelong Learning: Policy and Management from UCL, UK, and an MA in Adult Education from Linkoping University, Sweden.

Rosa Santibáñez holds a PhD in Pedagogy from the University of Deusto and a Diploma with specialisation in Criminology from the University of the Basque Country. She is professor at the University of Deusto, where she teaches at the Bilbao campus. She is currently the Vicerrector for Research and Transfer of the University of Deusto. She is Chief Researcher of the *INTERVENTION: Quality of Life and Social Inclusion* research team. Her publications mainly focus on socio-educational strategies capable of contributing towards the social inclusion of disadvantaged groups or those facing exclusion. Email: rosa.santibanez@deusto.es.

Josu Solabarrieta is the dean of the Faculty of Psychology and Education at the University of Deusto, previous vice-dean for Education at the same faculty, and director of the Institute of Education. He is a member of the Scientific Board of the Basque Institute of Evaluation, which is in charge of the evaluation of the Basque educational system, diagnostic evaluation of Basque students' competences, PISA and TIMSS implementation in Basque Country. Among his publications there are several reports about the situation of the educational system in the Basque country, and the evaluation of educational reforms. Email: josu.solabarrieta@deusto.es.

References

Appleby, Y., & Bathmaker, A. M. (2006). The new skills agenda: Increased lifelong learning or new sites of inequality? *British Educational Research Journal*, *32*(5), 703–717.

Atkinson, R., & Davoudi, S. (2000). The concept of social exclusion in the European union: Context, development and possibilities. *Journal of Common Market Studies*, *38*(3), 427–448.

Bauman, Z. (2011). *Collateral damage: Social inequalities in a global age*. Cambridge: Polity Press.

Berne, R., & Stiefel, L. (1984). *The measurement of equity in school finance: Conceptual, methodological, and empirical dimensions*. Baltimore: The Johns Hopkins University Press.

Bonoli, G., & Liechti, F. (2018). Good intentions and matthew effects: Access biases in participation in active labour market policies. *Journal of European Public Policy*, *25*(6), 894–911.

Borg, C., & Mayo, P. (2004). Diluted wine in new bottles: The key messages of the EU memorandum (on lifelong learning). *Lifelong Learning in Europe (Lline)*, *9*(1), 19–25.

Boyadjieva, P., & Ilieva-Trichkova, P. (2017). Between inclusion and fairness: Social justice perspective to participation in adult education. *Adult Education Quarterly*, *67*(2), 97–117.

Brine, J. (1998). The European union's discourse of 'equality' and its education and training policy within the post-compulsory sector. *Journal of Education Policy*, *13*(1), 137–152.

Brine, J. (2006). Lifelong learning and the knowledge economy: Those that know and those that do not - The discourse of the European union. *British Educational Research Journal*, *32*(5), 649–665.

Carrera, S., & Geyer, F. (2009). *EU policy on education: The impact on the social inclusion of vulnerable groups*. CEPS Special Report. Brussels: CEPS.

Castel, R. (2008). *La inseguridad social. ¿Qué es estar protegido?* Buenos Aires: Manantial.

Commission of the European Communities (CEC). (1993). Growth, competitiveness, employment: The challenges and ways forward into the 21st century. *(White Paper COM(93) 700)*. Luxembourg: Office for Official Publications of the European Communities.

Commission of the European Communities (CEC). (1995). Teaching and learning: Towards the learning society. *(White Paper on Education and Training)*. Luxembourg: Office for Official Publications of the European Communities.

Commission of the European Communities (CEC). (2000). *A memorandum on lifelong learning (SEC(2000) 1832*. Brussels: Commission of the European Communities.

Commission of the European Communities (CEC). (2006a). *Commission staff working document - accompanying document to the communication from the commission to the council and to the European parliament - efficiency and equity in European education and training systems*. Brussels: Commission of the European Communities.

Commission of the European Communities (CEC). (2006b). *Efficiency and equity in European education and training systems (COM(2006) 481 final)*. Brussels: Commission of the European Communities.
Council of the European Union (CEU). (2000). *Lisbon European council 23 and 24 March 2000: Presidency conclusions*. Retrieved from http://www.europarl.europa.eu/summits/lis1_en.htm
Council of the European Union (CEU). (2001). *Report from the education council to the European Council: The concrete future objectives of education and training systems (5680/01 EDUC 18)*. Brussels: Council of the European Union.
Council of the European Union (CEU). (2006). *Draft conclusions of the council and the representatives of the governments of the member states, meeting within the council, on efficiency and equity in education and training*. Retrieved from https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:42006X1208(01)&from=EN
Council of the European Union (CEU). (2009). *Council conclusions of 12 May 2009 on a strategic framework for European cooperation in education and training ('ET 2020')*. Retrieved from https://www.cedefop.europa.eu/files/education_benchmarks_2020.pdf
Council of the European Union (CEU). (2011). Council resolution on a renewed European agenda for adult learning. Retrieved from https://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=OJ:C:2011:372:0001:0006:EN:PDF
Council of the European Union (CEU). (2016). *Council recommendation of 19 December 2016 on upskilling pathways: New opportunities for adults*. Retrieved from https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:32016H1224(01)&from=E
Council of the European Union and Commission of the European Communities. (2008). *2008 Joint progress report of the council and the Commission on the implementation of the 'education and training 2010' work programme — 'delivering lifelong learning for knowledge, creativity and innovation'*. Retrieved from https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:52008XG0405(01)&qid=1573037322979&from=EN
Council of the European Union and Commission of the European Communities. (2010). *Joint progress report of the council and the commission on the implementation of the 'education and training 2010 work programme´*. Retrieved from https://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=OJ:C:2010:117:0001:0007:EN:PDF
De Greef, M., Verté, D., & Segers, M. (2012). Evaluation of the outcome of lifelong learning programmes for social inclusion: A phenomenographic research. *International Journal of Lifelong Education*, *31*(4), 453–476.
Demeuse, M., Crahay, M., & Monseur, C. (2001). Efficiency and equity. In W. Hutmacher, D. Cochrane, & N. Bottani (Eds.), *pursuit of equity in education – Using international indicators to compare equity policies* (pp. 65–92). Dordrecht: Kluwer Academic Publishers.
Desjardins, R. (2015). Participation in adult education opportunities: Evidence from PIAAC and policy trends in selected countries. *Background paper prepared for the Education for All Global Monitoring Report 2015*. Retrieved from http://unesdoc.unesco.org/images/0023/002323/232396e.pdf
Ertl, H. (2006). European union policies in education and training: The lisbon agenda as a turning point? *Comparative Education*, *42*(1), 5–27.
European Commission. (2012). *Rethinking Education: Investing in skills for better socio-economic outcomes (COM (2012) 669 final)*. Strasbourg: Author.
European Commission. (2014). *Education and training monitor 2014*. Luxembourg: Publications Office of the European Union.
European Commission. (2016). *A new skills agenda for Europe: Working together to strengthen human capital, employability and competitiveness (COM(2016) 381 final)*. Brussels: Author.
European Commission. (2017). *European Semester thematic factsheet: Addressing inequalities*. Brussels: Author.
European Parliament and Council of the European Union. (2006). *Recommendation of the European parliament and of the council of 18 December 2006 on key competences for lifelong learning*. Retrieved from https://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=OJ:L:2006:394:0010:0018:en:PDF
Field, S., Kuczera, M., & Pont, B. (2007). *No more failures: Ten steps to equity in education*. Paris: OECD.
Holford, J., Milana, M., & Špolar, V. M. (2014). Adult and lifelong education: The European union, its member states and the world. *International Journal of Lifelong Education*, *33*(3), 267–274.
Istance, D. (1997). *Education and equity in OECD countries*. Paris: OECD.
Lara Montero, A., van Duijn, S., Zonneveld, N., Minkman, M., & Nies, H. (2016). *Integrated social services in Europe*. Brighton: European Social Network.
Le Grand, J. (1982). *The strategy of equality: Redistribution and the social services*. London: George Allen and Unwin.
Levin, B. (2003). Approaches to equity in policy for lifelong learning. *A paper commissioned by the Education and Training Policy Division, OECD, for the Equity in Education Thematic Review*. Retrieved from http://www.oecd.org/education/innovation-education/38692676.pdf
Maiztegui-Oñate, C., & Santibáñez-Gruber, R. (2008). Access to education and equity in plural societies. *Intercultural Education*, *19*(5), 373–381.
Mustaniemi-Laakso, M., Heikkilä, M., Del Gaudio, E., Konstantis, S., Nagore Casas, M., Morondo, D., … Finlay, G. (2016). *The protection of vulnerable individuals in the context of EU policies on border checks, asylum and immigration*. Retrieved from http://www.fp7-frame.eu/wp-content/uploads/2016/08/Deliverable-11.3.pdf

Panitsides, E. A., & Anastasiadou, S. (2015). Lifelong learning policy agenda in the European union: A bi-level analysis. *Open Review of Educational Research*, *2*(1), 128–142.
Peroni, L., & Timmer, A. (2013). Vulnerable groups: The promise of an emerging concept in European human rights convention law. *International Journal of Constitutional Law*, *11*(4), 1056–1085.
Rankin, J., & Regan, S. (2004). *Meeting complex needs: The future of social care*. London: Turning Points/Institute of Public Policy Research (IPPR).
Riddell, S., & Weedon, E. (2014). European higher education, the inclusion of students from under-represented groups and the bologna process. *International Journal of Lifelong Education*, *33*(1), 26–44.
Riddell, S., Weedon, E., & Holford, J. (2014). Lifelong learning and higher education in Europe 1995–2011: Widening and/or narrowing access? *International Journal of Lifelong Education*, *33*(1), 1–6.
Rosengard, A., Laing, I., Ridley, J., & Hunter, S. (2007). *A literature review on multiple and complex needs*. Edinburgh: Scottish Executive Social Research. Retrieved from http://www.gov.scot/Resource/Doc/163153/0044343.pdf
Santibañez, R., Maiztegui, C., Chahrokh, H., Michalowski, I., Strasser, E., & Wolf, R. (2005). Equitable education and immigrant integration. In M. L. Fonseca & J. Malheiros (Eds.), *Social integration and mobility: Education, housing and health* (pp. pp. 65–88). Lisbon: University of Lisbon.
Sen, A. (1992). *Inequality re-examined*. Oxford: Oxford University Press.
Standing, G. (2011). *The precariat: The new dangerous class*. London: Bloomsbury Academic.
Tawney, R. H. (1931 (1938)). *Equality*. London: George Allen and Unwin.
UNDP. (2014)*Human development report 2014. Sustaining human progress: Reducing vulnerabilities and building resilience*. New York: UNDP.
UNESCO. (2014). *Education sector analysis methodological guidelines* (Vol. I). Retrieved from http://unesdoc.unesco.org/images/0023/002305/230532e.pdf.
UNESCO. (2015). *Incheon declaration. Education 2030: Towards inclusive and equitable quality education and lifelong learning for all*. Paris: Author.
UNESCO Institute for Statistics. (2007). Educational equity and public policy: Comparing results from 16 countries. *UIS Working Paper No. 6*. Montreal: Author.
Unterhalter, E. (2009). What is equity in education? Reflections from the capability approach. *Studies in Philosophy and Education*, *28*, 415–424.
Virokannas, E., Liuski, S., & Kuronen, M. (2018). The contested concept of vulnerability – A literature review. *European Journal of Social Work*, 1–13. doi:13691457.2018.1508001
Walther, A. (2006). Regimes of youth transitions: Choice, flexibility and security in young people's experiences across different European contexts. *YOUNG*, *14*(2), 119–139.