

**LLL2010 Subproject 2**

**BARRIERS TO AND IN PARTICIPATION  
IN LIFELONG LEARNING**

**Country Report on Estonia**

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## Introduction

The aim of the LLL2010 Subproject 2 (SP2) is to investigate participation and non-participation of adults in formal and non-formal learning on the basis of Eurostat Adult Education Survey (AES 2007) and Labour Force Survey ad hoc module on lifelong learning (LFS 2003). SP2 Comparative Reports<sup>1</sup> indicate that although participation rate in formal adult education in Estonia is close to the EU27 average (5-6%) and in non-formal learning above the average (40%), extent of problems or barriers adults face during participation decision-making process are among the highest in Europe, especially in regard to dispositional barriers (attitudes towards learning) among those who do not want to participate. Also in the light of early leavers from education and training, Estonia should strive to increase participation in adult formal and non-formal education. Even though this indicator for Estonia (11.6% in 2010) is lower than EU27 average (14.1%), still several post-socialist countries are faring better<sup>2</sup>. One way to increase successful participation in education and training is to tackle barriers to adult learning.

In this report, in addition to studying barriers perceived by those not participating in adult education/training, we provide an overview of problems that trouble those who are participating, as problems during participation may lead to interruption of one's studies. To give better understanding of the Estonian case, we compare respective results with the average of other new EU member states and pre-enlargement EU countries by different socio-demographic groups.

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<sup>1</sup> In particular: "Formal Adult Education in the Context. The View of European Statistics: The AES Data"; Robert, Sagi and Balogh 2011.

<sup>2</sup> Percentage of the population aged 18-24 with at most lower secondary education and not in further education or training in the Czech Republic and Slovenia 5% and Lithuania 8.1% (Eurostat, LFS 2010).

## Theoretical background

### ***Perspectives on barriers to learning***

Barriers associated with adult education are a central theme in some of the models that aim to explain the decision-making process of participation (Darkenwald and Merriam, 1982; Rubenson and Desjardins, 2009). In the literature concerning barriers or obstacles to learning Cross' (1981) classification has been widely applied. Cross classified the factors that create barriers to adult learning activities as: situational, institutional and dispositional. These factors operate both prior to and throughout learning.

- *Situational barriers*, also referred to as life factors (Fagan, 1991), are influences external to the individual or beyond his/her control (mostly work- and family-related, in other words circumstantial conditions). These barriers include for instance multiple roles and responsibilities regarding work, family, and community; the amount of time, energy and finances one can or is willing to invest in learning activities; the level of support received from significant others; the distance adult learner must travel to reach learning institution; etc.
- *Institutional barriers* or structural factors (Fagan, 1991) result from the ways institutions design, deliver and manage learning activities, which have not always considered the needs of adult learners, but probably gradually will. Institutional barriers relate to the availability and quality of information about learning opportunities; the level and type of credentials required to take up the studies; the quality and complexity of admission and registration procedures; the timing, scheduling and sequencing of learning opportunities; the attitudes of administrative staff and teachers toward adult learners; the quality and availability of essential support services for learners (library, computer, advising and counselling, transportation, ...), etc.
- *Dispositional barriers* based on personal attitudes, psychological impediments also referred to as learner-inherent (Fagan, 1991). These barriers relate to learner's perceptions of their ability to seek out, register in, attend and successfully complete learning activities. Dispositional factors are for instance self-confidence; attitudes about the benefits of learning; prior negative experiences in learning; perceptions

learners have about the attitudes of administrative staff and teachers; health and age related biases, etc.

Both situational and institutional barriers are structural in nature, while dispositional barriers are individual level hindrances. But rather often the (potential) learner has been 'blamed' for situational barriers too.

Some barriers, such as childcare, financial and transportation problems, could be classified as both situational and institutional depending on the source of the problem. For example, financial difficulties is situational barrier when a person does not have access to sufficient funds to pay for studies; and institutional when admission and registration fees are high, learners are required to purchase learning materials, states apply inflexible mechanisms to provide financial support (restrictions on taking study loans) and a like. Finances can also become an attitudinal barrier when the individual has to weight the costs of attending studies against the possible benefits (see also MacKeracher, Suart and Potter, 2006).

Potter and Alderman (1992) also added academic factors as a fourth set of barriers which mainly affect adult learners during learning activities (MacKeracher, Suart and Potter, 2006). Academic barriers occur because while having the necessary entry qualifications, skill level (literacy, innumeracy, computer skills, etc) of many potential adult learners might have declined in time. It might also take some time and effort to get accustomed to learning as such after longer disruption in ones learning path. However, academic barriers are not in the scope of this report.

Our second reference point in this study is 'bounded agency' model proposed by Rubenson and Desjardins (2009). According to 'bounded agency' model the ability and potential of individuals to participate in learning as adults is affected by structural and institutional conditions, as well as targeted policy measures. The state via targeted policy measures can have a direct effect on structurally derived barriers, but indirectly could also influence people's rational choices, awareness and assessment of the options available to them. It is presumed that different types of welfare regime (e.g. liberal, conservative, social democratic) have a different influence on barriers, particularly on institutional and structural ones (work- and family-related), and also on overcoming those barriers. Welfare regime in

Estonia, and other Baltic states, has been characterised as neoliberal that is illustrated by radically liberalised markets and the least generous welfare system among new EU members (Bohle and Greskovits, 2007a). For instance, in these countries, transnational corporations play a major role, which rather than significantly investing in local facilities, usually subcontract production and therefore have lower need to train employees (Bohle and Greskovits, 2007b). Thus we assume that in the context of neoliberal welfare regime in Estonia structural barriers (institutional and situational) are mainly to be overcome by the adults themselves and this in turn affects perception of dispositional barriers to further learning.

### ***Differences in perceiving barriers to participation in lifelong learning***

Previous studies have shown that situational barriers are more intensely perceived by younger and middle-aged adults (Rubenson and Desjardins, 2009). As situational barriers refer to one's immediate life situation (family and work responsibilities) then these are on average more often perceived by women compared to men. Education seems to have an impact on prevalence of institutional rather than situational barriers. Low-educated people mention more frequently institutional barriers, especially in regard to affordability of learning activities. Economically inactive groups and those with lower income may also feel more pressure by institutional barriers. Also dispositional barriers are more prevalent among adults with lower education, low income and out of employment. This is most likely to do with negative initial schooling experience (Gorard and Smith, 2007).

## **Methodology**

For analysis we use two quantitative databases: Eurostat Adult Education Survey (AES 2007) and LLL2010 Subproject 3 'Adult Learners in Formal Adult Education: Experiences and Perceptions' survey 'Adult Learners in Formal Education' (ALiFE 2007). First database is used for analysing participation in formal adult education of different social groups and reasons for non-participation in formal and non-formal education and training. In AES 2007 non-participants were asked to specify if they had an intention to participate in any kind of

learning activity. Thus here we can differentiate between those who did not participate and did not want to participate, and those who did not participate but wanted to participate in adult education. With the second database – ALiFE 2007 – we give an overview of problems adult learners face while participating in formal adult education. Another difference between the two databases is that in AES adult learner is defined by age – 25-64 year olds, while in ALiFE adult learner is not defined by age but by having interrupted formal education for two years or more, in other words those who have returned to adult formal education.

In this report we concentrate on Estonian case, but to provide a wider perspective we compare results with two groups of European countries: (a) new EU member states, post-socialist countries<sup>3</sup>; (b) pre-enlargement EU countries (and Norway) or conditionally we refer to this group as Western EU countries or EU15 (although not all 15 countries participated in the AES 2007).

In selecting social groups (socio-demographic characteristics) to compare in regard to participation in formal education and perception of barriers by non-participants we proceed from LLL2010 Subproject 2 Comparative Report which emphasised inequalities in participation among certain groups. Accordingly participation in adult education is analysed by following characteristics: gender, age, level of education<sup>4</sup>, income<sup>5</sup> and labour market status<sup>6</sup>.

We group perceived barriers applying Cross' (1981) classification as follows:

*Eurostat Adult Education Survey:*

- Institutional barriers – did not have the prerequisites; training was too expensive/could not afford it; there was no training offered at the reachable distance

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<sup>3</sup> In addition to Estonia from AES 2007: Bulgaria, the Czech Republic, Croatia, Hungary, Latvia, Lithuania, Poland, Slovenia and Slovakia.

<sup>4</sup> For analysis, educational levels are comprised as follows: (a) general secondary education (including basic education, ISCED 1-2 and 3b); (b) upper secondary (ISCED 3 a and b) and post-secondary (ISCED 4) education; (c) higher education (ISCED 5-6).

<sup>5</sup> Income quintiles based on the monthly (take home) pay from main job (quintiles 1-2 versus 3-5).

<sup>6</sup> For labour market status two groups are distinguished: employed versus unemployed and inactive.

- Situational barriers – lack of employer’s support; training conflicted with the work schedule; did not have time because of family responsibilities
- Dispositional barriers – not confident with the idea of going back to school; health or age related issues

*LLL2010 Subproject 3 survey on adult learners:*

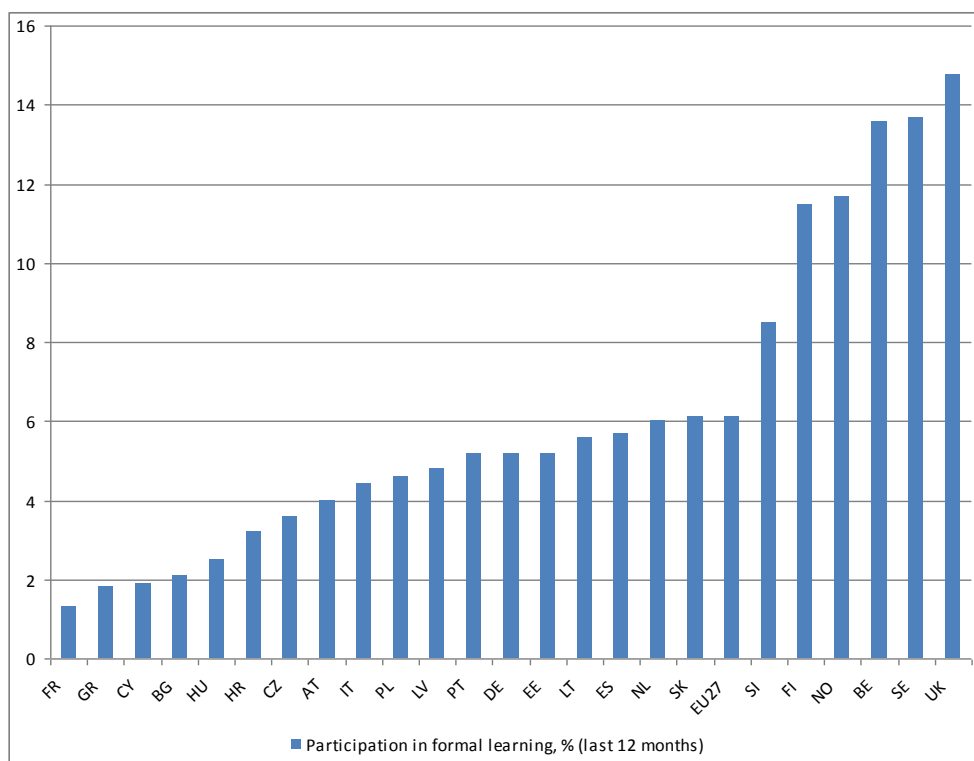
- Institutional barriers – financial problems; studies scheduled at an inconvenient moment; lack of preparation for the study programme
- Situational barriers – transportation problems; troubles arranging for childcare; too little time for studying; family problems
- Dispositional barriers – difficulties competing with younger students

As a first step we present results by each item that institutional, situational and dispositional barriers consist of and as a second step we compute a mean of all items under the three groups of barriers. For analysis we use cross-tabulations and means (independent sample t-test for comparison of two groups and ANOVA together with Bonferroni test for comparison of more than two socio-demographic groups).

## **Results**

Figure 1 demonstrates diverse participation in adult formal learning in Europe. In Nordic countries, Belgium and the UK overall participation in adult education is highest reaching from 11.5% up to 15%. They are followed by a large group of countries performing at EU27 average rate – 5-6%, Estonia among them. Finally there are countries with rather low adult formal education participation rate: France, Greece, Cyprus, Bulgaria, and Hungary.





**Figure 1. Participation in formal adult learning (age 25-64) in European countries, %**

*Source: EU Adult Education Survey (AES) 2007*

Thus patterns of participation frequencies comply with welfare state regime typology only partly, in case of Nordic countries (social-democratic) and the UK (liberal). Yet participation in formal adult learning is very different amongst continental (high participation in Belgium, lower in Germany and Austria) and Mediterranean (medium in Portugal, low in Italy, very low in Greece and Cyprus) countries. Slovenia, with higher than average participation rate, is an exceptional case in the group of post-socialist countries.

Partly these differences in participation patterns can be explained by the level of diversification of formal adult education systems (Hefler, 2010). For instance, in post-socialist countries definition or meaning of adult education (and lifelong learning in general) is narrower as compared to the UK, Ireland, Belgium or Nordic countries. This reflects the fact that formal adult education in former countries has lower level of diversification – lower variety of institutions providing formal adult education and lower variety in the length and content of programmes offered.

Although this report focuses on the Estonian case, to give a reference point, we will compare further results with other new EU member states and pre-enlargement EU countries.

**Participation in adult formal education in different socio-demographic groups**

From overall lifelong learning participation in European countries, formal education comprises only small fraction – about 6% of the population. Thus differences in one or few percentage points become rather significant. Results in Table 1 show that in Estonia women in the age group of 25-64 participate twice as often in formal education than men – 6% and 3% respectively. In new EU member states and pre-enlargement EU differences between men and women are smaller, but still latter are more likely to participate in formal education. We could assume that men are more reluctant to return ‘behind the school desk’ and completion of formal education requires too much time.

**Table 1. Participation in formal education by gender in Estonia, new EU member states and pre-enlargement EU, %**

Country	Participation in formal education	Gender		Total
		Men	Women	
Estonia	Yes	3	6	5
New EU members	Yes	4	5	4
Pre-enlargement EU	Yes	5	6	5

Source: EU Adult Education Survey (AES) 2007

Differences between Estonia and other country groups in participation in formal education are not too considerable in regard to age groups as well. Participation is highest in the youngest age group (25-29) (where we also find those obtaining their initial education) and drops by half in the age group of 30-39 year olds. Adults in their forties and fifties participate in formal education rather seldom. Difference between 30-39 and 40-49 year olds is slightly smaller among pre-enlargement EU countries – 7% and 4%, while in Estonia and other new EU countries the participation gap is somewhat wider. In the group of 50-64 year olds participation in formal education is 1% in Estonia and other Eastern European countries, and 2% in Western European countries. Thus there is a clear participation gap in terms of ones age – people over forty are significantly less likely to participate in formal education than their younger counterparts are. Yet in the light of population aging there is an increasing

need for attaining higher level of education later in life or training for a new profession (retraining). This also means that (adult) formal education systems constantly need to (re)address the learning needs of adults, as learning over the life course entails combining several life spheres/domains simultaneously. In addition learning process as such is likely to change with ones age, thus teaching and learning mechanisms should be more varied.

**Table 2. Participation in formal education by age groups in Estonia, new EU member states and pre-enlargement EU, %**

Country	Participation in formal education	Age groups				Total
		25-29	30-39	40-49	50+	
Estonia	Yes	16	8	3	1	5
New EU members	Yes	17	7	3	1	4
Pre-enlargement EU	Yes	18	7	4	2	6

Participation in adult formal education is highest among individuals with higher level of prior education – around 10% (Table 3). In case of Estonia we can observe slightly more even distribution in participation by educational level, but still among those with general secondary education (or lower) participation in formal education is mere 2%. In Estonia and other EU countries adults with upper secondary or post secondary education show participation rate similar to the overall average participation of the EU27 population (~5%). We might assume that those with more/longer experience in educational system feel more comfortable in returning to formal education activities, whereas those who have shorter educational paths perhaps have somewhat more negative experience of learning to begin with.

**Table 3. Participation in formal education by level of highest completed education in Estonia, new EU member states and pre-enlargement EU, %**

Country	Participation in formal education	Educational level			Total
		General secondary	Upper or post-secondary	Higher	
Estonia	Yes	2	4	9	5
New EU members	Yes	1	5	11	4
Pre-enlargement EU	Yes	2	6	12	6

If we distinguish only between two income quintiles then gap in formal education participation appears to be not too wide (in comparison to age or educational level differences) (Table 4). However, in Estonia and other post-socialist countries earners of lower income participate considerably less in formal education: 3-4% in low income (quintile 1-2) and 7% in higher income group (quintile 3-5). In pre-enlargement EU countries there is no difference in participation rates according to ones income.

**Table 4. Participation in formal education by income quintile in Estonia, new EU member states and pre-enlargement EU, %**

Country	Participation in formal education	Income quintiles		Total
		Quintile 1-2	Quintile 3-5	
Estonia	Yes	4	7	6
New EU members	Yes	3	7	5
Pre-enlargement EU	Yes	5	5	5

Regarding labour market status, pattern of participation in formal education in Estonia is the same as in Western EU countries, thus among employed participation rate is 5%, while among unemployed and inactive about 3% (Table 5). In new EU member countries on average unemployed and inactive participate to a lesser extent – 1%. Recently, Estonia has placed higher importance on active labour market measures, including training of unemployed. However, this mostly concerns non-formal education (training courses) and has been achieved by the support of European Social Fund.

**Table 5. Participation in formal education by main labour market status in Estonia, new EU member states and pre-enlargement EU, %**

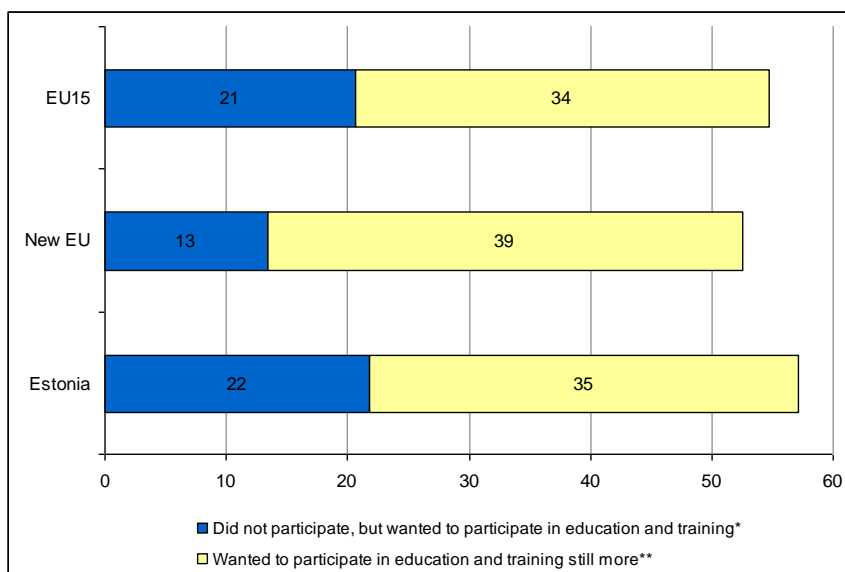
Country	Participation in formal education	Labour market status		Total
		Employed	Unemployed, inactive	
Estonia	Yes	5	3	5
New EU members	Yes	5	1	4
Pre-enlargement EU	Yes	5	3	4

*Note* \*Here learners are excluded from the analysis

### ***Perceived barriers to participation in lifelong learning***

To examine which barriers adults perceive when thinking about further learning we analyse both formal and non-formal learning, as in the AES 2007 questions regarding reasons for non-participation were posed considering possible participation in education and training.

To begin with, Figure 2 indicates that in Estonia about one-fifth of those who did not participate in education or training actually express willingness to participate in the future, and 35% of those who already participated would like to participate still more. Respective percentages are quite the same for pre-enlargement or Western EU countries too. Yet, in new EU member states only around tenth of those not participating in education or training want to participate and 39% of those who did participate are willing to participate more. Thus, compared to other new EU members, in Estonia non-participants seem to be more eager to participate in lifelong learning at some point in their lives.



**Figure 2. Willingness to participate in education and training in Estonia, new EU member states and pre enlargement EU, %**

Source: EU Adult Education Survey (AES) 2007

Note: \*Percentage of those who did not participate in any educational or training activity

\*\*Percentage of those who participated in at least one educational or training activity

Table 6 gives an overview of perceived barriers by two groups of non-participants: (a) those that had no intention to participate; and (b) those that had intention to participate in education or training.

In regard to *institutional barriers* we see that in Estonia and in other new EU countries they are perceived much more frequently than in pre-enlargement EU. Hence, in Estonia about one third of those with no intention to participate in formal or non-formal learning say that one reason for this is high cost of training. Among those who had intention to participate in education or training respective rate is even higher – 44%. Rather often adults in Estonia also perceived that there was no training offered in the reachable distance: 23% among those with no intention and 32% among those with intention to participate in adult education. Yet, in Estonia and in other countries too, only around tenth of those who did not want to participate in education or training said that one reason for this was not having necessary prerequisites. Remarkably, in Estonia only 2% of adults who wanted to participate in adult education did not participate because of the lack of prerequisites, whereas in new EU countries and EU15 the respective reason was mentioned by about 10% of respondents.

From *situational barriers* we see that those who did not participate in any learning activity struggle the most with time issues due to family responsibilities: about 30% of adults in Estonia and other new EU member countries. Not having time because of family responsibilities is somewhat less problematic in pre-enlargement EU countries for those who did not want to participate in education or training. However, among those who had the intention to participate, more than 40% mention this as a problem. Adults are also very much concerned with conflicting training and work schedules, especially those who claim to have wanted to participate in further learning – 35% in Estonia and around 40% in other EU countries. Interestingly enough, in Estonia only very few adults (less than 10%) mention that they did not participate in education or training because of the lack of employer's support. We detect similar trend in EU15 countries among adults with no intention to participate in adult education. While in new EU member countries employer's support is listed as a hindrance by 21% of respondents with the intention to participate.

According to one's intention to participate we observe that in new EU countries and especially in Estonia decision not to participate in education or training tends to be affected the most by *dispositional barriers*. About half of adults in Estonia say the reason for not wanting to participate in further learning is health or age related, and not being confident

with the idea of going back to school. Respective rates are rather high (31-35%) in other new EU member countries as well, whereas in pre-enlargement EU only about 20% of respondents not wanting to participate bring up dispositional barriers. In all countries dispositional barriers – issues related to one’s attitude towards the idea of learning – have comparatively low effect on participation decision of those with the intention to participate in adult education.

Finally, Table 6 shows that in Estonia, similarly to other new EU member countries, about half of respondents who did not participate in education or training explained this decision with not needing to participate for the job-related or personal reasons. In old or pre-enlargement EU countries around one third of respondents claimed that they did not need to participate for the job-related reasons and 40% claimed personal reasons.

**Table 6. Barriers to participation in education and training in Estonia, new EU member states and pre-enlargement EU, %**

Barriers to learning	Estonia		New EU members		Pre-enlargement EU	
	Intended to participate No	Yes*	Intended to participate No	Yes*	Intended to participate No	Yes*
<i>Institutional barriers</i>						
Did not have the prerequisites	8	2	9	9	11	10
Training was too expensive/could not afford it	31	44	24	43	11	23
There was no training offered at the reachable distance	23	33	15	28	11	18
<i>Situational barriers</i>						
Lack of employer’s support	6	8	17	21	9	16
Training conflicted with the work schedule	15	35	19	42	20	43
Did not have time because of family responsibilities	28	34	30	33	23	42
<i>Dispositional barriers</i>						
Not confident with the idea of going back to school	48	6	31	9	20	8
Health or age related issues	51	11	35	9	22	11
<i>Reasons for not participating</i>						
Did not need to participate for the job-related reasons	47	–	49	–	34	–
Did not need to participate for personal reasons	51	–	48	–	40	–

*Note* \*Had intention to participate also includes those who would like to participate still more

*Source: EU Adult Education Survey (AES) 2007*

Respondents were also asked to name most important reason for not participating in any learning activity (see Table 1A, Appendix). In Estonia, for those with no intention to participate, dispositional barrier – health or age related issues – remains the biggest hindrance (31%) to participation. Next most important reason for non-participation for this group is not having time because of family responsibilities (12%) and about fifth say they did not need to participate for the job-related reasons. For those who would like to participate in education or training in Estonia most important obstacle is high training costs (28%), followed by training and work schedule conflict (21%) and lack of time due to family commitments (17%). The pattern of most important barriers to learning is similar in other new EU member countries, whereas adults in pre-enlargement countries mention significantly less often not being able to afford training.

### **Perception of barriers to learning in different socio-demographic groups**

In further analysis we present results only for those non-participants who expressed no intention to participate in any education or training activities. Here we rely on the work of Robert, Sagi and Balogh (SP2 Comparative Report, 2011) which showed that respondents who did not participate but wanted to engage in formal or non-formal learning in the future are in some ways uncertain group. It seems that they, compared to those with no intention to participate, constitute a very heterogeneous group with probably different degrees of participation intention in mind.

According to gender groups it appears that women perceive somewhat more often than men institutional and situational barriers (Table 7<sup>7</sup>). In Estonia and other new EU member countries both men and women tend to be more conscious of institutional barriers when compared to their counterparts in pre-enlargement EU. In the latter also dispositional barriers are felt to a lesser degree. In new EU countries and especially in Estonia dispositional barriers dominate in arguments against participation in education or training.

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<sup>7</sup> Means presented in Table 7 and following tables can also be interpreted as average percentages. Thus, if for men in regard to institutional barriers the mean is 0.19 we can say that on average 19% of men state institutional barriers to explain their non-participation in education or training.



In case of Estonia, men state somewhat more often as a reasons for non-participation barriers referring to negative attitude towards learning.

**Table 7. Barriers to participation in education and training by gender in Estonia, new EU member states and pre-enlargement EU, means (standard deviation)**

Barriers to participation in education and training	Country						
	Estonia		New EU members		Pre-enlargement EU		
<i>Gender</i>	<i>Men</i>	<i>Women</i>	<i>Men</i>	<i>Women</i>	<i>Men</i>	<i>Women</i>	
Institutional barriers	Mean	0.19	0.21	0.16*	0.17*	0.10*	0.11*
	Std. Deviation	(.27)	(.29)	(.26)	(.27)	(.24)	(.25)
Situational barriers	Mean	0.15	0.17	0.17*	0.21*	0.18*	0.21*
	Std. Deviation	(.24)	(.24)	(.27)	(.29)	(.28)	(.28)
Dispositional barriers	Mean	0.52	0.48	0.33	0.33	0.21*	0.22*
	Std. Deviation	(.40)	(.41)	(.33)	(.35)	(.32)	(.33)

*Note:* Marked with \* statistical significance at level 0.01

*Source:* EU Adult Education Survey (AES) 2007

When analysing age groups we observe that in Estonia institutional barriers are to some extent experienced more often by adults in older age groups (40-49 and over 50 years of age) (Table 8). Yet in other new EU countries trend is quite the opposite, here those over 50 years of age mention institutional barriers to participation in education or training the least. In EU15 differences between age groups in regard to institutional hindrances are very small and these barriers seem to decrease with one's age. In Estonia and other new EU member countries, situational barriers are mostly felt by those in younger age groups (25-29 and 30-39), but also by those in their forties. Balancing work and family commitments is most intense for adults in their younger ages. This trend is somewhat different again in pre-enlargement EU countries. Namely here, adults in their twenties claim less often having situational barriers to leaning. We might assume that this is a result of slightly different family planning in the two country clusters – in pre-enlargement EU average age of women at childbirth is a bit higher (Eurostat, Fertility data). In all countries, dispositional barriers to learning prevail in older age groups, especially among adults over 50 years of age. But again in EU15, adults over 50 state dispositional barriers considerably less.

**Table 8. Barriers to participation in education and training by age groups in Estonia, new EU member states and pre-enlargement EU, means (standard deviation)**

Barriers to participation in education and training		Country											
		Estonia				New EU members				Pre-enlargement EU			
<i>Age groups</i>		<i>25-29</i>	<i>30-39</i>	<i>40-49</i>	<i>50+</i>	<i>25-39</i>	<i>30-39</i>	<i>40-49</i>	<i>50+</i>	<i>25-39</i>	<i>30-39</i>	<i>40-49</i>	<i>50+</i>
Institutional barriers	Mean	0.18	0.19	0.23	0.21	0.19	0.19	0.19	0.13*	0.12	0.11	0.11	0.10*
	Std. Deviation	(.26)	(.26)	(.28)	(.29)	(.27)	(.27)	(.27)	(.25)	(.25)	(.25)	(.24)	(.24)
Situational barriers	Mean	0.23	0.24	0.17*	0.11*	0.25	0.26	0.21*	0.15*	0.19*	0.23	0.22	0.15*
	Std. Deviation	(.25)	(.25)	(.25)	(.21)	(.29)	(.29)	(.28)	(.26)	(.27)	(.29)	(.29)	(.26)
Dispositional barriers	Mean	0.26	0.20	0.44*	0.67*	0.19	0.20	0.30*	0.43*	0.13	0.14	0.17*	0.28*
	Std. Deviation	(.31)	(.30)	(.39)	(.37)	(.26)	(.28)	(.34)	(.35)	(.25)	(.27)	(.31)	(.35)

*Note:* Marked with \* statistical significance at level 0.01

In regard to the level of completed education we see that institutional barriers are more intensely perceived by those with up to post-secondary education (Table 9). In all countries adults with higher education mention institutional barriers to learning the least, particularly so in pre-enlargement EU. Thus adults with higher education are less constrained by not having prerequisites for further learning, not being able to afford training or having transportation problems to reach training location. There are only small differences in perception of situational barriers by the level of completed education. However, dispositional barriers are more often stated by those with general secondary-, upper- and post-secondary education. Differences between educational groups are highest in case of Estonia and here also those with higher education experience dispositional barriers to learning more often than adults with lower levels of education in new and pre-enlargement EU countries. Hence, negative attitude towards adult education and training in Estonia is considerably affecting participation of those with higher education too.

**Table 9. Barriers to participation in education and training by level of completed education in Estonia, new EU member states and pre-enlargement EU, means (standard deviation)**

Barriers to participation in education and training		Country								
		Estonia			New EU members			Pre-enlargement EU		
<i>Level of education</i>		<i>General secondr</i>	<i>Upper or post-secondry</i>	<i>Higher</i>	<i>General secondr</i>	<i>Upper or post-secondry</i>	<i>Higher</i>	<i>General secondr</i>	<i>Upper or post-secondry</i>	<i>Higher</i>
Institutional barriers	Mean	0.24	0.20	0.17	0.18*	0.15*	0.11*	0.11	0.11	0.06*
	Std. Deviation	(.30)	(.28)	(.27)	(.28)	(.24)	(.21)	(.25)	(.24)	(.18)
Situational barriers	Mean	0.17	0.16	0.16	0.19	0.20	0.19	0.18*	0.22*	0.20*
	Std. Deviation	(.26)	(.23)	(.24)	(.29)	(.27)	(.26)	(.27)	(.30)	(.26)
Dispositional barriers	Mean	0.57	.50	0.39*	0.36*	0.31*	0.23*	0.25*	0.18*	0.10*
	Std. Deviation	(.40)	(.40)	(.41)	(.35)	(.34)	(.32)	(.34)	(.30)	(.23)

Note: Marked with \* statistical significance at level 0.01

In line of the income level it appears that in Estonia and other new EU member countries adults receiving lower income (quintiles 1-2) report more often different types of barriers to participation in education or training (Table 10). In Estonia adults with lower income tend to perceive more institutional barriers to learning, while in other EU countries situational barriers are mentioned more often. But again in Estonia, dispositional barriers to learning are mentioned most frequently – difference between income groups is double. In other new EU countries dispositional barriers are felt to a same degree with situational ones. It is noteworthy that in pre-enlargement EU there are practically no differences by income level in regard to any of the barriers.

**Table 10. Barriers to participation in education and training by income quintiles in Estonia, new EU member states and pre-enlargement EU, means (standard deviation)**

Barriers to participation in education and training	Country						
	Estonia		New EU members		Pre-enlargement EU		
<i>Income quintiles</i>	<i>Quintiles 1-2</i>	<i>Quintiles 3-5</i>	<i>Quintiles 1-2</i>	<i>Quintiles 3-5</i>	<i>Quintiles 1-2</i>	<i>Quintiles 3-5</i>	
Institutional barriers	Mean	0.25*	0.13*	0.18*	0.14*	0.11	0.12
	Std. Deviation	(.31)	(.22)	(.28)	(.24)	(.25)	(.25)
Situational barriers	Mean	0.19*	0.14*	0.31*	0.22*	0.21*	0.23*
	Std. Deviation	(.27)	(.23)	(.34)	(.28)	(.30)	(.31)
Dispositional barriers	Mean	0.57*	0.34*	0.33*	0.22*	0.18	0.18
	Std. Deviation	(.40)	(.38)	(.26)	(.31)	(.31)	(.31)

*Note: Marked with \* statistical significance at level 0.01*

In Table 11 we see that in Estonia according to labour market status differences between unemployed or inactive and employed are less pronounced than they were in previous comparisons (with the exception of gender differences). For Estonia we once more observe higher perception of institutional barriers over situational ones, whereas in other EU countries situational barriers somewhat prevail. In regard to institutional barriers to learning there are nearly no differences according to one's labour market status, but these barriers are stated to a lesser degree in pre-enlargement EU countries. Barriers related to one's attitude are perceived the most by unemployed and inactive adults. But in Estonia also employed adults express dispositional barriers slightly more than unemployed and inactive in new EU member countries. In EU15 unemployed and inactive perceive dispositional barriers to education or training the least, yet here the mean is one of the highest for this country cluster (comparable to those with up to general secondary education and 50 years of age and older).

**Table 11. Barriers to participation in education and training by labour market status in Estonia, new EU member states and pre-enlargement EU, means (standard deviation)**

Barriers to participation in education and training		Country					
		Estonia		New EU members		Pre-enlargement EU	
<i>Labour market status</i>		<i>Unempl. inactive</i>	<i>Employed</i>	<i>Unempl. inactive</i>	<i>Employed</i>	<i>Unempl. inactive</i>	<i>Employed</i>
Institutional barriers	Mean	0.22	0.20	0.16	0.16	0.11*	0.10*
	Std. Deviation	(.24)	(.28)	(.27)	(.26)	(.25)	(.23)
Situational barriers	Mean	0.13*	0.18*	0.18*	0.20*	0.13*	0.22*
	Std. Deviation	(.19)	(.26)	(.28)	(.27)	(.24)	(.29)
Dispositional barriers	Mean	0.57*	0.46*	0.42*	0.26*	0.28*	0.17*
	Std. Deviation	(.40)	(.40)	(.34)	(.33)	(.34)	(.30)

*Note: Marked with \* statistical significance at level 0.01*

### Perception of barriers in the process of learning

To provide further comparison, we give a brief overview of barriers that are perceived by adult learners during their participation in adult formal education<sup>8</sup>. From the data collected by LLL2010 project (survey of adult learners) it appears that among actual participants both institutional and situational barriers are of concern (Table 12). In Estonia and other new EU members on the overall barriers are perceived more than in pre-enlargement EU countries. We can also say that adults participating in formal education state different institutional and situational barriers more often than those who did not participate in education or training and had no intention to do so. Trend regarding dispositional barriers is quite the opposite, here dispositional barriers are mentioned considerably more often by those who did not participate in education or training than by those actively participating in formal education. Although we have to keep in mind that these two datasets applied different sampling methods and regard different types of learning (formal vs formal and non-formal) and thus respective comparisons need to be treated with care.

<sup>8</sup> Please note that here we again refer to formal adult education, while barriers to participation concerned formal and non-formal education.

**Table 12. Barriers during participation in formal education in Estonia, new EU member states and pre-enlargement EU, means (standard deviation)**

Barriers during participation in formal education		Country		
		Estonia	New EU members	Pre-enlargement EU
Institutional barriers	Mean	0.30	0.27	0.21
	Std. Deviation	(.30)	(.28)	(.27)
Situational barriers	Mean	0.28	0.27	0.21
	Std. Deviation	(.26)	(.25)	(.23)
Dispositional barriers	Mean	0.13	0.14	0.06
	Std. Deviation	(.33)	(.34)	(.26)

Source: LLL2010 SP3 survey *Adult Learners in Formal Education (ALiFE 2007)*

From the list of *institutional barriers* asked in the questionnaire, adult learners reorganised the most financial problems (see Table 13). In Estonia and other new EU countries about 40% of adult learners stated having financial problems during their studies. In Western European countries also financial problems prevail under institutional barriers, but to a lesser extent – 27%. Roughly one third of adult learners in Estonia also feel that studies are scheduled at an inconvenient time and that they lack of preparation for the study programme. Respective rates in new EU members and pre-enlargement EU countries are about 20%. Thus in Estonia adult learners perceive institutional barriers somewhat more than their counterparts in other countries do.

Having too little time for studying is most pronounced problem perceived under *situational barriers*. About half of adult learners in Estonia and other post-socialist countries mention having this problem, in Western countries this time constraint is felt a bit less (42%). Quite often adult learners in Estonia and other new EU countries struggle with transportation problems – ~30%. In pre-enlargement countries the same problem is stated by 17% of adult learners. Up to fifth of respondents in Estonia and other EU countries perceive troubles arranging for childcare and family problems. In EU15 these problems are mentioned by 12% of respondents. Hence in Estonia adult learners perceive situational barriers to the same extent as do learners in other new EU member countries, whereas in pre-enlargement EU these problems are perceived less.

**Table 13. Barriers during participation in formal education in Estonia, new EU member states and pre-enlargement EU, %**

Barriers to learning	Estonia	New EU members	Pre-enlargement EU
<i>Institutional barriers</i>			
Financial problems	40	39	27
Studies scheduled at an inconvenient moment	27	21	17
Lack of preparation for the study programme	26	21	21
<i>Situational barriers</i>			
Transportation problems	29	26	17
Troubles arranging for childcare	18	18	12
Too little time for studying	50	48	42
Family problems	19	15	12
<i>Dispositional barriers</i>			
Difficulties competing with younger students	13	14	9

Source: LLL2010 SP3 survey *Adult Learners in Formal Education (ALiFE 2007)*

Also *dispositional barriers* are perceived somewhat more by adult learners in Estonia and other new EU countries, but differences between country groups here are significantly smaller. In former little more than one tenth of adult learners state having difficulties in competing with younger students, while in pre-enlargement countries 9% mention this as a problem.

## Conclusion

In this report we explored barriers to and in participation in formal and non-formal learning in Estonia and compared results with those of other European countries. All in all in Estonia participation in formal adult learning is about the EU average, yet perception of different barriers associated with the decision to learn and during actual learning is high in comparison to pre-enlargement EU countries, but in some aspects also high when compared to other new EU member states. Thus tackling the issue of barriers to and in adult learning most likely will increase overall participation, which is very much desired in the context of increasing skill demand on the labour market and aging of the population.

To provide more detailed insights, we studied participation and barriers related to participation by socio-demographic groups. Although in all countries adult formal education participation rate tends to be in favour of certain social groups (often those at more advantageous position), in Estonia some participation inequalities are higher. Hence, in Estonia women are participating twice as often as men in formal education. Participation gap is higher in Estonia and other new EU countries also in regard to one's age and especially income level. Latter corresponds well with the fact that in Estonia one third of respondents not wanting to participate in education or training have decided so because they perceive training costs to be too high. Among those who have the intention to participate in adult education or training this percentage is even higher. In addition, up to third of adults in Estonia state that there is no training offered in the reachable distance. Respective rates are considerably lower in Western European countries. Thus, adults in Estonia feel very much constrained by institutional barriers to learning, while situational barriers are perceived significantly less than in other countries. Nonetheless, in Estonia time related reasons for non-participation are mentioned by more than one third of adults. However, about half of adults not wanting to participate in education or training in Estonia have explained this decision with dispositional barriers – not confident with the idea of going back to school and health or age related issues.

By socio-demographic groups we found more pronounced differences in perception of barriers in Estonia in regard to one's age, educational level and income. These trends are in



accordance with the results of previous studies (Rubenson and Desjardins, 2009; Gorard and Smith, 2007). In younger and middle age groups situational barriers – balance between family, work and learning – are perceived more often than by those in their fifties. Yet, adults in their forties and especially so in their fifties state very intensely dispositional (attitudinal) reasons for not wanting to return to learning. Adults with general secondary or lower education and those receiving lower income perceive more institutional barriers to learning. It is difficult for them to pay for education or training and we might assume that employers too are less keen to invest in terms of training in employees at lower position<sup>9</sup>. Due to lower income also covering the distance to training facility poses more financial pressures. But even more important is that more than half of adults with low education and income do not want to participate in education or training because of dispositional barriers. Partly this result can be explained by negative previous learning experience (Gorard and Smith, 2007), but probably also perception of structural barriers to learning resonates in more negative attitude towards the idea of continuing learning.

For actual learners dispositional barriers are not a problem as they have already made the decision to participate in adult education and therefore consider educational activity relevant and meaningful. However, situational and institutional barriers are an issue here and even more so than for those who did not participate and did not want to participate in adult education or training. In Estonia, adults participating in formal education state most often having financial problems and time constraints, followed by transportation problems and lack of preparation for the study programme. Although actual learners are managing different problems they face during studies, without sufficient support at some point they might be forced to interrupt their studies.

Removing or shifting dispositional barriers to education and training in Estonia should be highest priority, as even those in so to say privileged socio-demographic groups (younger, more educated, employed) perceive dispositional barriers more than less privileged do in other European countries. As was indicated by Hefler (2010), post-socialist countries apply rather narrow definition to adult education where mainly long programmes in second

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<sup>9</sup> Although on average lack of employer's support was mentioned considerably less in Estonia as compared to other European countries. However, in the AES 2007 questionnaire the means of support (financial or other) was not specified.

chance education are offered. Most likely, in adult minds the strict classroom image of formal education is carried over to non-formal training/courses as well. Even though AES 2007 survey did not distinguish between age and health related reasons for non-participation (one indicator of dispositional barriers), we still might assume that adults in Estonia are very much accustomed to the idea that education should mainly be acquired in youth. Hence, whole paradigm of learning or lifelong learning needs to change – more diverse activities to be considered as learning (e.g. community learning). This urgency is rather well illustrated by a statement one of our students: *'When I learn I do not memorise things, but when I do not learn I memorise easily'*.

In addition, LLL2010 Subproject 3 – Adult Learner in Formal Education – showed that classroom environment (learning/teaching process) has very significant role in shaping one's confidence of finishing studies and satisfaction with learning. Thus, creating more positive learning environment starting from initial education might be one step in lowering dispositional barriers to learning in adulthood.

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## Appendix

**Table 1A. Most important barriers to participation in education and training in Estonia, new EU member states and pre-enlargement EU, %**

Barriers to learning	Estonia		New EU members		Pre-enlargement EU	
	Intended to participate No	Yes	Intended to participate No	Yes	Intended to participate No	Yes
<i>Institutional barriers</i>						
Did not have the prerequisites	0	0	2	3	1	2
Training was too expensive/could not afford it	8	28	2	24	6	9
There was no training offered at the reachable distance	3	8	2	8	2	6
<i>Situational barriers</i>						
Lack of employer's support	1	2	1	7	2	6
Training conflicted with the work schedule	3	21	6	22	4	20
Did not have time because of family responsibilities	12	17	17	15	10	23
<i>Dispositional barriers</i>						
Not confident with the idea of going back to school	8	1	4	3	8	1
Health or age related issues	31	2	13	4	25	4
<i>Other barriers</i>						
Did not need to participate for the job-related reasons	18	–	12	–	27	–
Did not need to participate for personal reasons	6	–	9	–	13	–

Note \*Question not included in the national survey in Italy

\*\*Had intention to participate also includes those who would like to participate still more

\*\*\*Categories 'other' (for those not wanting to participate, in total 7% and wanted to participate 14%) and 'don't know' (in total ~10%) are not included here

Source: EU Adult Education Survey (AES) 2007