Glocal Education in Practice: Teaching, Researching, and Citizenship

Glocal Education in Practice: Teaching, Researching, and Citizenship

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Preface

Nikolay Popov

Glocal Education in the 2019 BCES Conference

This volume contains selected papers submitted to the XVII Annual International Conference of the Bulgarian Comparative Education Society (BCES) held in June 2019 in Pomorie, Bulgaria. The XVII BCES Conference theme is *Glocal Education in Practice: Teaching, Researching, and Citizenship*.

Some selected papers submitted to the pre-conference International Symposium on *30 Years since the Fall of the Berlin Wall* are also included in this volume.

The book includes 34 papers written by 69 authors from 20 countries. The volume starts with an introductory piece by the keynote speaker Ewelina Niemczyk. The other 34 papers are divided into 7 parts: 1) Comparative and International Education & History of Education; 2) International Organizations and Education; 3) School Education: Policies, Innovations, Practices & Entrepreneurship; 4) Higher Education & Teacher Education and Training; 5) Law and Education; 6) Research Education & Research Practice; 7) Thirty Years since the Fall of the Berlin Wall: Educational Reforms Worldwide.

Glocal education is the main term in this volume discussed from theoretical, methodological and empirical points of view. Most papers directly or circuitously refer to glocal education in teaching, learning, researching, and citizenship. Different profound and well defended opinions on glocal education can be seen in the volume.

Niemczyk's view (p. 13) is that:

At the heart of glocal education is the exploration of local and global connections to maximize glocal consciousness. The concept can be understood in terms of a form of dual citizenship that comes with privileges and responsibilities. ... Glocal education is meant to provide the capacity to recognize oneself in the narrative of the interconnected world as well as local realities.

From a comparativist's point of view, Wolhuter (p. 22) criticizes the use of "glocal" as threshold concept in Comparative and International Education, meaning the dimension of geographical levels of analysis:

"Glocal" when used by comparativists gives recognition to both "local" and "global" context in shaping education; although the role of each as agency is not clear. Furthermore, the exact meaning of "local" is unclear.

Kachakova (p. 110) gives an example of how joint projects on European topics between schools and municipalities:

... could be considered as good practices for promoting glocal education and active citizenship among young people and this initiative is worthy to continue in a larger scale and on a regular basis in the future.

Shotte (p. 83) ends her discussion on the changing landscapes in a glocalized learning environment with the appeal:

I hope that the time will come when we embrace changing landscapes in a borderless, non-nationalistic environment where the entry visa is agape.

Viewing all papers in this volume, it can definitely be concluded that it is a valuable source for interesting studies on various educational problems in the light of globalization, localization, internationalization, and glocalization.

Despite the ways how the global is meant – as a real global, comprising all parts of the world, or a less global (supra national or international), and how the local is meant – as a real local (municipal), or a more local (regional or national), glocal education in its practical aspects as teaching, learning, researching and citizenship requires people to be recipients, guardians and givers of both global achievements and local traditions.

May 2019

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Introduction

Ewelina K. Niemczyk

Glocal Education in Practice: Teaching, Researching, and Citizenship

Abstract

Internationally, there is a growing body of work on globalization and glocalization driven by a rapidly changing world and associated global and local issues. Although both notions, globalization and glocalization, have developed as a response to the increasingly interconnected and interdependent world, global education has gained stronger scholarly attention than glocal education. This paper provides a platform to put together the two notions in conversation with each other in order to uncover the meaning of glocal education in practice in connection to teaching, researching, and citizenship.

Keywords: glocal education, glocal citizenship, global education, glocalization, globalization, internationalization

Introduction: Nexus between notions

In our highly interconnected and interdependent world, people are on the move, products and services are offered internationally, and advanced technologies create changes in society as well as in scholarly fields. According to Williams and Graham (2014, p. 1), "contemporary movements and border crossings in society and academia need to be considered or linked with reshaping the way we teach glocal students and educate glocal citizens". Mannion (2015, p. 29) suggests that education for glocal citizenship and glocally oriented pedagogies offer more comprehensive educational opportunities than education for global citizenship: "Glocal pedagogies respond to contemporary ecological and social issues in ways that take account of the integrated nature of local and global processes." This paper supports the abovementioned scholarly assertions, bringing forward the notions of globalization, glocalization, and internationalization with a link to glocal and global education. Glocal education is then explored in connection to teaching, researching, and citizenship.

The term *globalization* is fairly new (1980s) in scholarly research and educational discourse (Jackson, 2016). There is no universally accepted definition for the term *globalization*, which is complex and contested. In general, the term describes the spread of technology, trade, and democracy across the globe (Conroy, 2017). This, in turn, breaks down boundaries and barriers that have an impact on economic development, workforce mobility, and the circulation of knowledge and ideas (Conroy, 2017; Zhao, 2007). In education, technological advancements have

significantly influenced new ways of teaching, learning, and researching across the world. Scholars, however, warn that schools are instruments of globalization, with the agenda to promote a dominant ideology. Robertson (2012) informs that relying solely on the notion of globalization is limiting, since it neglects the complex interconnection between the global and the local as well as existing power dynamics between the two notions. The word *global* can be associated with standardization, while *local* calls for the realization that there are differences between contexts that need to be considered and respected (e.g. culture, environment, and legal requirements). Mannion (2015, p. 20) explains that "the term 'glocal' is a useful idea because it provides an inbuilt critique of some contemporary notions of globalization that lurk behind many so-called global curriculum initiatives".

Another relevant term that needs to be addressed is *glocalization*, which originated in Japanese business practices, meaning global localization. Until now, the term has often been used in reference to globally distributed products or services that are tailored to accommodate the users or consumers in local markets. Converting this process from economic to social and educational systems shows that glocalization is not about universalization. It simply means that global developments in a specific area mix with local culture to produce the desired outcome. As Mannion (2015, p. 21) indicates, "[g]localization as a term helps us capture the idea that the local is always with, through, and in the global. Put another way, the global always has a local context for its operationalization". In terms of social diversity, glocalization attempts to connect universal and local values, placing them in a familiar context (Tagüeña, 2008). Patel and Lynch (2013, p. 223) state that "*glocalized* learning and teaching refers to the curricular consideration and pedagogical framing of local and global community connectedness in relation to social responsibility, justice and sustainability". Harris and De Bruin (2018) explain that glocalization considers the complexity of globalization, problematizing a compressed worldview that comes with it.

Scholarly literature also brings attention to *glocal awareness* in connection to an *internationalization* agenda. It goes without saying that internationalization, which is sought after by most educational institutions, affects aspects of teaching and research. Patel (2017) argues that the internationalization paradigm is based exclusively on Western knowledge, which undervalues and takes away legitimacy from other forms of knowledge. According to Patel (2017), higher education internationalization is a skillfully engineered apparatus designed to generate lavish revenue with a limited focus on the context-based solutions or sustainable social change benefiting local communities. He calls for a redesign of internationalization and a shift towards the glocalization of learning, which promotes the legitimacy of different forms of knowledge, respects diverse cultural traditions, and embraces equity and inclusivity.

The term *glocal* originally was coined by sociologist Roland Robertson in the 1980s, portraying a blend of *local* and *global*. In alignment with this, Longman's Dictionary (2018) explains that the word *glocal* relates to the connections and relationships between global and local elements, social aspects, and associated issues. Tagüeña (2008), viewing the notion from a social justice perspective, states that the glocal approach integrates the global and the local, presenting global knowledge in connection to the local context, respecting human rights. She also

talks about the glocal science advocacy strategy, where global issues are discussed in classrooms, making them meaningful to local society. Currently, there are no universal standards for glocal education; however, some scholars, institutions, and organizations have developed a variety of approaches and frameworks for glocal education. In general, the glocal approach to education can be understood in terms of (a) how educational institutions manage to transfer an understanding of global realities, opportunities, and challenges with connection to the local context, and (b) how the educational institutions are meeting the mission of addressing local needs while addressing global realities and performing at a level of global aspirations. At the heart of glocal education is the exploration of local and global connections to maximize glocal consciousness. The concept can be understood in terms of a form of dual citizenship that comes with privileges and responsibilities. We are all citizens of a specific nation, as well as citizens of the world, sharing the same goal to understand and sustain the world in which we live. Glocal education is meant to provide the capacity to recognize oneself in the narrative of the interconnected world as well as local realities.

Teaching

Teach the world as well as teach the word.
Freire, 1970

Without any doubt, a curriculum can be defined as the core of any learning institution, which means that schools and universities cannot exist without a curriculum. We can also state, without any doubt, that the curriculum in formal education has increasingly become a dynamic process driven by the changes of the globalized world (Alvior, 2014). We live in times of global developments, the so-called Fourth Industrial Revolution era, where things are constantly shifting and evolving, and it is our responsibility as educators, and often decision makers, to keep ourselves up-to-date. Thinking about curriculum design and implementation requires carefully thinking about what the currently expected outcomes of a given curriculum (and education at large) are. We need to have a comprehensive awareness of what kind of teachers, researchers, and ultimately citizens we are seeking to prepare, and not how many learners need to graduate to satisfy school rankings or the international competitive educational system.

The literature informs us that the main purpose of curriculum development is to ensure that learners receive cohesive (*interconnected*) and coherent (*clear*) learning experiences that contribute to their personal and professional development. Therefore the curriculum needs to consider learners' different backgrounds, abilities, motivations, experiences, and learning styles, to mention only a few variables. Meanwhile, the content being taught needs to be systematically updated and made relevant at the global and the local level. The American Association for Colleges and Universities (2015), for instance, recommends that schools' learning objectives (or outcomes of a specific program) include civic knowledge and engagement (local and global), as well as intercultural knowledge.

It is also essential to notice that the mere exchange and acquisition of information are not education. William Pinar (2004), an American curriculum theorist, argues that being informed is not equivalent to being educated. Information

must be tempered with intellectual judgment, critical thinking, ethics, and self-awareness. In this case, self-awareness, as one's positioning within a global society and local realities, is of the essence as it accounts for glocal awareness. Choudaha (2012) uses the term *glocals*, referring to a new sector of students as "people who have global aspirations, but need to stay local". Such students have aspirations to become globally competent but, for various reasons (financial constraints, insufficient academic merit, or family obligations), are unable to experience overseas education. In short, glocal students are looking for quality global education, leading to a good career or career advancement without moving far from home.

As explained by Caniglia, Bellina, Lang, and Laubichler (2017), merging global and local means bringing together local learning, engagement, and impact with global communication, collaboration, and knowledge production. This process takes place across social, cultural, and geographical boundaries and involves the way students learn about the world and how to act responsibly in it. The current era calls for a fluid rather than a fragmented understanding of society and social issues. It is all about interconnectivity among places, experiences, realities, and subjects. For instance, Finnish education is introducing teaching by phenomenon in basic education, with the intention to have the new system in place across the whole country by 2020. Chibber (2015) in Quartz, a news publication, states that Finnish schools are already teaching by phenomenon rather than by subject, which means that learners study broader topics, such as the European Union, with a multi-dimensional and multi-discipline approach. Supporters of this program feel that teaching in the old-fashioned way worked in the early 1900s; however, the new concept is more suited for the 21st century because it is rooted in real-world experiences reflecting the interconnectivity of subjects and contexts.

Researching

> *Comparative Education does not contend with studying one education system in its societal context in isolation. Various education systems, shaped by their societal contexts, are compared and hence the comparative perspective.*
> Charl Wolhuter, 2018

Comparative education has a supportive and informative role for the entire educational studies as a discipline. Comparative education, investigating aspects of educational systems, always takes into consideration the respective social contexts (locality) by which these educational systems were shaped and are influenced. Therefore the element of localization is inseparable from the perspective of comparative education and the comparative research method. As stated accurately by Wolhuter (2018, p. 33), the "focus of Comparative Education is broader than just the education system *per se*. The education system is studied within its societal context and is regarded as being shaped by, or as being the outcome of societal forces (geographic, demographic, social, economic, cultural, political and religious)". A multitude of social and environmental variables need to be taken into consideration before identifying and implementing a good practice from one context to another. As Sir Michael Ernest Sadler (quoted in Hayhoe & Mundy, 2008, p. 4) indicated over a century ago:

> *[i]n studying foreign systems of education, we should not forget that the things outside the schools matter even more than the things inside the schools, and govern*

and interpret the things inside. We cannot wander at pleasure among the educational systems of the world, like a child strolling through a garden, and pick off a flower from one bush and some leaves from another, and then expect that if we stick what we have gathered into the soil at home, we shall have a living plant. A national system of education is a living thing.

In the globalized 21st century, we cannot ignore global influences; however, neither can localization or positioning be ignored. As pointed out by Hayhoe and Mundy (2008, p. 17), "conceptually, globalization challenges comparative education's traditional focus on national systems of education. It also creates opportunities for understanding those aspects of the educational enterprise that transcend national borders". In fact, both notions, globalization and glocalization, are equally important and lessons can be learned from the nexus of the global and the local. The following on-the-ground example, borrowed from Tagüeña (2008, para 9), clearly illustrates the glocal approach to a research project:

A glocal approach would take the global system of health and vaccines to isolated ethnic groups, together with anthropologists and science communicators who understand the local way of life. These communicators would work with locals (preferably in their original languages) to explore why they can trust medicine and how some simple changes in their domestic routines might improve their health. In the process, we may learn of traditional methods that are useful to our modern society.

This brings attention to glocal awareness in preparation of future researchers. The ever-changing research environment calls for competent researchers who are able to contribute to the knowledge-based economy and serve as agents of change, locally and globally. The cross-national initiatives to expand doctoral programs need to be followed by investments in quality doctoral programs and glocal research training. Niemczyk (2018) explains that researchers are expected to become knowledge producers, innovators, leaders, and contributors to prosperity and sustainable development. Therefore, in order to meet these expectations, quality research training needs to become a priority, as opposed to the number of degrees desired.

Citizenship

Young people growing up in the new century are inheriting a "glocal" world (in which the local is in the global and the global is in the local).
David Bohm, 1983

Without any doubt, with globalization, the concept of citizenship has become more complex. Mannion, Biesta, Priestley, and Ross (2011) explain that education for global citizenship developed and gained popularity as the result of the pressure to make a living in a globalized world. Jorgenson and Shultz (2012) show that on the surface, global citizenship education may appear to be focused on social justice and inclusion; however, its primary goal can be, in some cases, the advancement of internationalization and marketization. According to Tichnor-Wagner (2017, p. 71), it is essential that teachers demonstrate to students that global citizenship and national citizenship are not mutually exclusive. In fact, global citizenship education cannot ignore the relevance of the local. Mannion (2015, p. 24) argues that "especially in policies of education for global citizenship, we risk overemphasizing the global at the expense of the local, which is clearly a necessary ingredient".

Glocal education requires schools to create a culture that encourages students to explore and comprehend current social realities and issues. Educators, in their role as facilitators, are in the position to introduce students to global and local realities along with the relative interconnections. Students should not only be offered knowledge but also be empowered to see themselves as glocal citizens who are able to make a difference in the local and global community and thus contribute to a peaceful and sustainable future.

As described by Oomen (2015), there are many reasons for recognizing the value of glocal citizenship. According to the author, glocal citizenship focuses on action as much as on knowledge and beliefs. For instance, confronting global challenges requires local action, which is usually more realistic to undertake:

> *...recycling your waste water is easier than directly addressing desertification in the Sahara; helping refugees feel at home in your city is more doable than stopping boats from sinking in the Mediterranean; working for the local foodbank is easier to achieve than combating famine in Africa.* (Oomen, 2015, p. 13)

Sklad, Friedman, Park and Oomen (2016) also echo the need to focus on action next to learning. The authors claim that in order to provide students with a transforming teaching experience while discussing global challenges, education for global citizenship needs to be education for glocal citizenship:

> *Such action has to be cognizant of the degree to which the local is constitutive of the global (and vice versa), and the ways in which engagement at home can be as important as engagement in faraway places.* (Sklad et al., 2016, p. 336)

It is essential to recognize that since we are glocal citizens, we are not educating individuals only to become glocal citizens. Instead, we are educating them to gain awareness of their dual citizenship that goes along with privileges and responsibilities. Glocal education has the potential to instill in students complex self-conception and opportunities for active engagement. Not everyone should become an active agent for change, but everyone should be well informed, which promotes decision making in general. Teaching students at all levels of education to recognize their multilayered status within the world gives them a more accurate perception of themselves as citizens of a nation and citizens of the world. This, in turn, connects to the aspect of glocal education that rejects "knowledge parochialism", the idea that one's own knowledge system is superior and thus sufficient for complex living (Fataar, 2017). Educational institutions (schools and universities) devoted to glocal citizenship education nurture in students respect for people, diverse cultural knowledge systems, and the environment.

Conclusion: Going glocal

Considering that we live in a glocal interconnectedness, whether teaching or researching, we have the responsibility to recognize ourselves within the local and global society. We cannot afford to escape critical reflection and engagement in dialogue about complex social issues that are intertwined between the local and the global. As demonstrated in the paper, the local is always part of the global.

Striving to educate teachers, researchers, and ultimately citizens as critical readers of the world, we need to devote more attention to glocal education and thus glocal awareness. As mentioned earlier, the word *global* implies some sort of

standardization and *global education* may promote dominant ways of knowing. Meanwhile, no knowledge system is superior over another and omnisufficient for current social complexities. In the complex world where people occupy the status of national and global citizens, *glocal education* offers a more comprehensive outlook on the integrated nature of the local and the global. What needs to be avoided is viewing global citizenship and national citizenship as mutually exclusive notions. In fact, global citizenship education cannot ignore the relevance of the local citizenship.

The comparative research method has the potential to provide further understanding of the value of glocal education, exploring opportunities, challenges, and best practices that different contexts can learn from one another in terms of transformative learning and researching.

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Part 1

Comparative and International Education & History of Education

Charl Wolhuter

Problematizing "Glocal" as a Catchword in Comparative and International Education

Abstract

"Glocal" has become a catchword in Comparative and International Education, as the compelling force of globalization has forced the Comparative and International Education scholarly community to reconsider their field. This paper traces the strong hold that the nation-state as level of analysis has had on scholars in the field, and how that notion and attendant conceptual tools have come under pressure. The variety of theoretical or paradigmatic responses to the global versus "local" in the field is surveyed. The paper concludes that the concept of "glocal" is a rather naïve escape from a complex situation, and such a response has the potential to incur great damage to the field. In conclusion a new theoretical framework, encompassing not only both the global and the "local", but the entire hierarchy of contexts creating an evolving new global tapestry of education systems is suggested to render the field of Comparative and International Education streamlined to fulfill its mission in the twenty-first century.

Keywords: comparative and international education, globalization, glocal, levels of analysis, paradigms

Introduction

Scholars in the field of Comparative and International Education have a penchant for the theoretical bases and for the paradigmatic frameworks of the field. In fact, the signature feature of the field at least since 1990, according to Paulston's (1997) phraseology of the historical evolution of the field, has been that of paradigmatic proliferation. The compelling force of globalization has stirred feelings of an existential crisis among the Comparative and International Education scholarly community (Wolhuter, 2015b). A common answer (which the community borrowed from other fields of scholarship and from public discourse) is to proffer the notion of the "glocal". The aim of this paper is to critically assess the use of "glocal" as threshold concept in Comparative and International Education. The paper uses a historical approach – tracing geographical unit(s) of analyses during various phases in the historical evolution of the field. How geographical units of analyses in the field have been disrupted by the appearance of the force of globalization is then

depicted. The field (and related fields) stance viz-viz the phenomenon of globalization is the outlined, and the concept of the "glocal" and found to be far to naïve, furthermore appearing to be a symptom of laxity among scholars in the field. A more nuanced and complex framework with respect to the dimension of geographical levels of analysis is called for in the contemporary societal context, and scholars in the field should urgently attend to this assignment.

Geographical levels of analysis in the history of Comparative Education

In the historical evolution of the field of Comparative and International Education, the following seven phases can be demarcated:

- a phase of travellers' tales;
- a phase of the systematic study of foreign education systems with the intention of borrowing;
- a phase of international cooperation;
- a "factors and forces" phase;
- a social science phase;
- a phase of heterodoxy; and finally
- a phase of heterogeneity (cf. Wolhuter, 2019).

During the primitive, pre-scientific phase of travellers' tales in the field, no particular geographical level or unit was salient. The practitioners of the second phase, that is the systematic study of foreign education systems with the intention to borrow best ideas, policies and practices to improve the domestic education project, have always had the nation state as principal unit of analysis. This applies as much to classic progenitor of this phase Victor Cousin (1792-1867) who admired the Prussian education system as model to be emulated by his native France, as modern-day, PISA inspired comparisons, e.g. the United Kingdom taking Hong Kong as education example (cf. Forrestier & Crossley, 2015). The nation-state retained its position as principal unit of analysis in the field during the phase of international cooperation. This too is evident right from the landmark publication of Marc-Antoinne Jullien, the "father of Comparative Education" (cf. Fraser, 1964). The central slate of Jullien's *Plan* was, after all the collection of data of the education systems of *countries*, so as to guide particular *nations* to improve their education systems.

By about 1930 Comparative Education entered the "factors and forces" phase, the basic tenet of the field was now to place the focus on societal contextual forces (geography, demography, social system, technology, economy, politics, religion and life and world view) as these shape education systems. Invariably these education systems were *national* education systems only. For example, one of the seminal Comparative Education textbooks of the era was Nicholas Hans' (1949) *Comparative Education: A study of educational factors and traditions*, which dealt with the education systems of England, the United States of America, France and the Union of the Socialist Soviet Republics. Undisputed leader in the field at the time, in fact during the entire first half of the twentieth century (cf. Wolhuter et al., 2009), Isaac L Kandel, describes the essence and reason for existence of Comparative Education as follows: "Comparative Education would be meaningless unless it tried to discover the meaning of nationalism as it furnishes the basis of education system"

(Kandel, 1933). In his book *Studies in Comparative* Education (1933), till long after the Second World War considered to be the standard textbook in the field of Comparative Education, he preferred the notion of "nation character" and that the central assignment of the Comparative Education scholar is to reveal and to reconstruct the "national character" of each nation or country, as it is this "national character" which forms the basis for the comprehension of each system of education. This approach (on the set of distinctive contextual forces giving rise to an equally unique education system in the case of each nation) and its exclusive focus on the *national* education system can be related to the interwar era, being characterized by rising nationalism (especially in Europe but also beyond) and by the rise of the nation-state as powerful force in (world) politics.

The three subsequent phases in the history of the field are the social science phase (from 1960), a phase of heterodoxy (or paradigm wars) from about 1970, and finally a phase of heterogeneity (of increasing diversity of paradigms) since 1990 (cf. Paulston, 1997; Wolhuter, 2019). In what has become a standard analytical tool in the field, the Bray & Thomas (1995) cube, distinguish between the following (geographical) levels in the field: Level 1. World regions/continents; Level 2. Countries; Level 3. States/provinces; Level 4. Districts; Level 5. Schools; Level 6. Classrooms; and Level 7. Individuals. Yet despite this impressive vista, the nation state has tenaciously remained the main unit of analysis in Comparative Education scholarship. In an analysis of all articles published during the first fifty years of existence of the top journal in the field, the *Comparative Education Review*, Wolhuter (2008, p. 325) found that in each period in the existence of the journal the nation state was the level of analysis of the overwhelming majority of articles.

Comparative and International Education confronted by the force of globalization

It was, while still comfortably cushioned in their theoretical and analytical edifice of the nation state, that comparativists too were confronted by the reality of the compelling force of globalization sweeping over the world. While there is no universal definition of globalization, the following description of Held (1991, p. 9) will be used as a working definition in this paper: "globalization refers to the intensification of worldwide social relations". The reality of this force did not only disrupt the established schema of privileging (if not according exclusive status) to the *national* as the parameter of the shaping force of education systems – this will be topic of discussion in this paper, it also brought comparativists before a fundamental existential crisis regarding the justifiability and definition of the scope of the field of Comparative Education (cf. Wolhuter, 2015b), the discussion of which falls outside the scope of this paper (but has been done elsewhere, cf. Wolhuter, 2015a).

Comparative and International Education scholarly community's response to globalization

The responses of the Comparative and International Education scholarly community to the force of globalization could be arranged along two dimensions. The first dimension represents a range of value-judgments of globalization, similar to those found in other social sciences and in the public discourse. Belgian

comparativist Roger Standaerdt (2008) distinguishes between three stances: anti-globalization, pro-globalization, and other-globalization. The first then represents a negative judgment on globalization (and its effect on education), the second judge globalization to be a benevolent force, whilst protagonists of the third see in globalization *per se* potential advantages, but plead for a different kind of globalization than that currently manifesting itself in the world. In Comparative Education literature the anti-globalization stance seems to dominate (cf. Wolhuter, 2008, pp. 334-335).

The second dimension deals with the relative agency accorded to global versus local contextual forces shaping education, and by extension then education too. On the one hand there are those proclaiming isomorphism, seeing a homogenization of education all over the world, under the influence of the (uniform) forces of globalization. In the Comparative and International Education scholarly community the most well-known protagonists of this position are the Stanford comparativists John W. Meyer, Francisco O. Ramirez and John Boli, a classic publication in this regard is their 1985 article published in the *Comparative Education Review* (Meyer et al., 1985). However, this position is also maintained by those using the theoretical framework of neo-institutionalism, which is by no means uncommon in the field of Comparative and International Education (cf. Wiseman et al., 2013). On the other end of the spectrum there are those scholars who tenaciously hold on to the position of the "local" as being immune to the forces of globalization in giving shape to education systems. As an example the publication of Takayama (2010) could be cited. Other scholars have attempted to allocate in their schema place for both global and local forces. An example is Bruno-Jofré (Ed.) (2012), using the metaphor of the "refraction": that is global forces refracted by different spaces. Such a metaphor sounds like suggesting a rather passive role for the local, and no dynamic interaction between local and global. The metaphor of the "dialectic between the global and the local", appearing in the sub-title of R. F. Arnove, C. A. Torres and S. Franz' (Eds.) *Comparative Education: The dialectics of the global and the local*, do allocate a place for both global and local, as well as for the dynamic interplay between the two. But, from the point of view of the theme of this paper, the main shortcoming of that book, which is the most common prescribed text for Comparative Education courses at universities in the world, is that the chapters nowhere unpacks the notion of the dialectic of the local and the global in education.

At this point in time, when comparativists are shaken out of their comfort zone and set ways by the compelling force of globalization, many have seized at the notion of the "glocal", following a trend in other social sciences and in the public discourse at large. The lexical meaning or definition of "glocal" is "reflecting or characterized by both local and global considerations" (Oxford Living Dictionary, 2019).

Conclusion

"Glocal" when used by comparativists gives recognition to both "local" and "global" context in shaping education; although the role of each as agency is not clear. Furthermore, the exact meaning of "local" is unclear. "Local" in its general use in public and scholarly discourse in the social sciences certainly has a much more, narrower circumscribed meaning than "national" which is presumably the

meaning in Comparative Education discourse, given the persistent place of the nation state as dominant unit of geographical analysis. However, the Comparative Education literature contains examples of studies demonstrating the salient and active role of context as shaping force of education, at a range of levels: global, supra-national, national, sub-national (province/state), district and even local community level (cf. Wolhuter, 2008). These contextual forces as at their various levels in this hierarchy, as they shape education (systems) should be combed out by scholars in the field, as scholars reconstruct the more complex but infinitely richer tapestry of education systems now evolving over the globe. Conversely, scholars in the field should also tease out the societal effects or dividend of education (the one part of the subject of the field woefully neglected by scholars in the field thus far, cf. Wolhuter, 2008), using this hierarchy of contexts as theoretical framework. In this way scholars can build a corpus of knowledge corresponding to reality and promising to fulfill into the twenty-first century the most noble purpose of the field, namely pursuing the philanthropic mission laid down by founding father Jullien (cf. Wolhuter (Ed.), 2019).

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The Development of a 'New' Theory in Education: The Subsequent Steps

Abstract

This paper is a sequel to the author's 2018 BCES presentation in which the rationale was explained for developing a 'new' theory for analytically and critically examining problems in (comparative) education. An outline is given of the steps subsequently taken to develop the theory in more detail. It also sketches practical / pragmatic and theoretical possibilities for the future of the theory.

Keywords: scholarship, theory, science, education, social space and ethical / moral function / action theory, comparative education

Introduction

At the previous BCES Conference (Van der Walt, 2018a), I related how I came to the conclusion that I should begin to purposefully expound the scholarly theory that I had been applying for years though not under any specific name or banner. I shared how, in my article-writing seminars I kept insisting that article writers go beyond the inclusion of a mere literature study, survey or review in their articles but should also reflect on the results of their literature reviews and empirical studies by harnessing a suitable scholarly theory as analytical and critical instrument. I also advised that one should consider developing your own scholarly theory if extant theories were found to be unsuitable or inadequate for the current purpose. I concluded the BCES presentation with an outline of what it entailed to develop such a potentially workable 'new' theory. The purpose of the present paper is to share some of the developments in connection with the further development of the theory.

How the theory unfolded so far

Pre-2018 developments

As a philosopher of education, I was schooled in Education as well as in pure Philosophy. My studies in the latter acquainted me with systematics such as 'the philosophy of the cosmonomic idea' and of 'the creation idea'. Their ontologies and cosmologies differ only regarding some detail issues. Both of them operate with the modal structure of reality which encompasses the social and the ethical modalities or functions of reality (in addition to some 13 others). These modalities of reality cohere in several ways and hence are inextricably interwoven (cf. Strauss, 2009, pp. 67-103). The 'new' *social space and ethical action or function theory* that began crystallizing in 2017 centered particularly on the social and the ethical modal functions or aspects of reality. I realized, however, that I could not only focus on the ethical side (compliance with values and principles imposed from *outside* a person,

such as a code of conduct) of the ethical function, but should also concentrate on the moral side (compliance with moral principles that are imposed from *within*).

The growing impact of post-modernism (Thompson, 2017, pp. 173-176) and later of post-post-foundationalism (Olthuis, 2012) gradually caused systematic approaches to the analysis of educational phenomena to become less fashionable; thematic and problem-based analyses of phenomena were regarded as more appropriate. This new approach to education problems, however, did not and still today does not detract from the importance of viewing an educational problem in its social context (space) and to evaluate the morality of behavior and actions within that social space. Insights gleaned from social action theory (Van der Walt & Wolhuter, 2018a) and from cultural-historical action theory (Engeström & Sannino, 2010) gave impetus to the conclusion that understanding of the social space in which an event or a particular behavior occurs is important. I therefore began to purposefully flesh out and apply the social space and ethical / moral behavior / action theory on education issues from 2017 onwards.

After having produced several journal articles on neoliberalism as a possible philosophical approach to education, I decided to also critique neoliberalism as a potential philosophy of education from the vantage point of the social space and ethical function or action theory. In an article discussing some of the more salient responses to neoliberalism in education (Van der Walt, 2017a), I demonstrated how several anti-neoliberal movements were taking up social space in our life-world, their criticism of neoliberalism as well as that in some ways also their particular principles and actions could not be defended on ethical / moral grounds. That article represents a turning point in that it contains a brief formulation of the social space and ethical / moral function theory, though only in a footnote, and also in the form of application of the theory.

The second opportunity to put the theory to work was at the Education and New Developments Conference of 2017 where I employed the theory as one of three philosophical-methodological instruments for critiquing the neoliberal approach to education (Van der Walt, 2017b). A third opportunity for doing so presented itself in an article in the journal *LitNet (Opvoedkunde)* (Van der Walt, 2017c) where I harnessed the theory for deciding whether forgiveness education was theoretically appropriately grounded or not. The final opportunity in 2017 for applying the theory came in an article in *In Luce Verbi* (Van der Walt, 2017d) in a further discussion of forgiveness education. The problematic of this article offered an opportunity for a fairly detailed exposition of the theory.

All the publications mentioned below either contain further outlines, elements or applications of the theory on theoretical-pedagogical issues.

Applications of the theory in 2018

The theory found a wide range of application during 2018. I followed up the discussion about forgiveness education in an article in the *Journal of Humanities* (Van der Walt, 2018b) where the social space and ethical action theory played a background role in mooting forgiveness education as a strategy for the possible prevention of emotional pain in those suffering from not being forgiven or from not forgiving others. The theory was subsequently employed for a critical evaluation of TVET in England (Andresen & Van der Walt, 2018). The theory enabled us to show

where TVET policy had gone wrong under the impact of neoliberalism and how the situation could be addressed to make it morally justifiable. In collaboration with another co-author, the theory was then used in a discussion about how a researcher could go about creating a theoretical framework for research (Van der Walt & Wolhuter, 2018b). Another article in which the theory played a role was produced in collaboration with four co-authors (Van der Walt, Wolhuter, Potgieter, De Muynck & Broer, 2019). This article centred on the imperative of addressing immorality and anomie in violent and violence afflicted societies. An important further step in the development of the theory was taken in this article; the notion of ethical action was expanded to also embrace moral considerations. In other words, the behaviour of actors in their particular social spaces was from this point on viewed not only in terms of how they complied with external values and expectations but also with their own personal values and principles.

Further unfolding of the theory in 2019

The research done by myself and co-researchers in 2018, the results of which were reported in the articles and book chapters mentioned below, is currently under review. In each of the following research reports (articles, papers, chapters) the social space and ethical / moral action / function theory played either a prominent or a background role in explaining a situation or critiquing positions taken in the various discourses. Among these publications counts an article regarding a parental perspective on school indiscipline in South Africa (Wolhuter & Van der Walt, 2019). Our conclusion in this case was that parents contributed in various ways to the current indiscipline in schools in South Africa and hence had a detrimental impact on the social space of their children, particularly on the school as a societal relationship. Parents have to be urged to review their actions so as to render them more morally and pedagogically justifiable.

Over the years, our research focus shifted from religion and spirituality, forgiveness and hospitality education to educational and moral problems associated with citizenship and citizenship education in increasingly diverse social spaces such as caused by the influx of foreigners (resulting in xenophobia and other atrocities), societies in the throes of social and political transformation having to grapple with anomie and violence. A result of this shift was an article on the moral and other problems faced by Citizenship Education as a school subject in the current space of "flows", a space in which everything is in constant flux and change, and in which national borders are increasingly permeable (Van der Walt, 2019a). Another article examined the moral and other difficulties experienced in Greek education due to its social space having been detrimentally affected by economic reforms since 2008 (Kalerante, Eleftherios, Van der Walt & Wolhuter, 2019). This was followed by a paper prepared for the Berlin Wall Symposium (Van der Walt, 2019c) in which I examined the extent to which the social space in South Africa afforded room for Christian education to be revived after the collapse of the Wall, of the Soviet Union and of Communism. Wolhuter, Van der Walt, Potgieter and Janmaat (2019) subsequently produced an article centring on the question whether South Africa could learn from international experience in coping with increased diversity in society. 2018 ended with an article on the imperative that citizens in deeply divided societies / nations (social spaces) should enter into a new social contract with one

another, thereby accepting the direction-giving of a moral compass (Van der Walt, 2019b).

Lessons learned so far

I concluded the 2018 BCES paper by stating that the development of a 'new' theory was an onerous task. The research that we did in the past year proved that conclusion to be correct. Not only does the development of a 'new' theory demand attention to detail but also dealing with (and learning from) the responses of reviewers of manuscripts submitted to scholarly journals. Reviewers can be negative and obstructive (by offering unhelpful criticisms) when confronted with a 'new' theory or they can be positive and constructive. I will concentrate on the latter. A well-known South African philosopher contributed significantly to the unfolding of the social space and ethical / moral function / action theory by not only working meticulously through the article submitted to him for review but also by giving helpful advice about how the theory could be improved, particularly as far as the notion of social space (one of his areas of philosophical interest) was concerned. He supplemented his review of the article with electronic copies of 12 of his own articles on the subject and pointed to elements in his publications that might be useful for the further development of the theory. A perusal of those publications led to several deeper insights regarding the social space element of the social space and ethical / moral function/action theory.

This reviewer provided an example of how scholarly work should be reviewed, namely by playing the 'publication game' in accordance with the 'rulebook' offered by the author of the article (not one imposed on the manuscript by the reviewer), and by helping improve insights and arguments proffered in the article. This was achieved by this particular reviewer without thereby neglecting the task of academic gate-keeping. Inputs such as these and others have led to improvements in the development of the theory and in the effectiveness with which it can henceforth be applied as an analytical-critical instrument.

The way forward

What will the future hold for the further development of the theory? At the time of the writing of this paper (December 2018), there seem to be two possibilities, one practical and the other of a theoretical-scholarly nature. As far as the former is concerned, we have committed ourselves to further research on aspects of citizenship education, particularly to a reflection on how the ideals for citizenship and citizenship education could relate to new developments in the social-time space of the 21st century. The following research question will be addressed: How should we see the future, particularly as it unfolds regarding the issue of citizenship (education)? Subthemes such as the following flow from this question regarding the late(r) 21st century as a social space: how should we approach an unpredictable future (a futurological issue); how will new technological developments (faster internet connection, the social media, false news, for instance) impact on how citizenship is developed and seen by citizens and authorities; how will climate change affect the migration patterns of people across the world, and how will this impact on citizenship and on citizenship education? Other factors that might impact

on citizenship and citizenship education are developments regarding religion and religious diversity, developments in society and the issue of globalism.

All of these envisaged changes and developments point to a deeper theoretical issue that is expected to impact on the further unfolding of the theory. As Veugelers (2011, p. 474) correctly concluded, the concept of citizenship and therefore of citizenship education, is far from univocal. It might aim at socialisation or adaptation, at subjectification (Biesta, 2011, p. 151) or the forming of democratic attitudes. Whatever the case, it is already clear that citizenship is not something static, something that everybody, also newcomers, has to conform to. Citizenship, we already know, is dynamic and subject to historical developments and human interpretation and construction, and also to developments worldwide, which explains its 'glocal' aspect. Veugelers (2011, p. 475) created a nexus between moral functions or actions and the social space in citizenship education by arguing that morality should be connected with the political; moral values also function in political power relations; moral values are only meaningful in concrete social and political relations. These observations of Veugelers and others offer a window of opportunity for the social space and ethical / moral function / action theory to play a key role in future research.

Conclusion

The development of a 'new' theory remains an ongoing task; it is never concluded. The social space and ethical / moral function / action theory took a number of years to come to such a level of maturity that it could be given a workable name. Much remains to be done regarding the further development and application of the theory. Two tasks are envisaged regarding the further unfolding of the theory, namely continued application thereof in issues of a practical and pragmatic nature, and the continued theoretical development thereof as an instrument for scholarly analytical-critical activity (an undertaking in the philosophy of pedagogical science).

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Towards a Narrative Vision for Philosophy of Education: Postmodernism, the Pilgrim and the Journey

Abstract

This paper argues in favour of a narrative vision for philosophy of education in a postmodern context. I argue that while the nihilistic[i] strand of postmodernity might continue to challenge the viability of religious discourse in education(al) environments, postmodernity also re-opens the world towards its pre-rational foundations by means of the rediscovery of the primacy of narrative. In a postmodern age, any philosophy of education implies a basic understanding of, at least, the (historical) present and the past in order to establish its place in the scholarly community of educators and educationists. I theorize the postmodern rediscovery of narrative by demonstrating how the journey of the pilgrim is a continuous narrative of living ethics and vulnerable hospitality.

Keywords: narrative, postmodernity, philosophy, education, pilgrim, vulnerable hospitality

Introduction

Krüger (2018, pp. 1-2) argues that three entangled sets of problems (that occur in various mixes in different parts of the globe) compel us to rediscover and return to the root and nature of things. These are: (a) the ecological crisis announcing the destruction of many forms of life (the extreme fragility of nature), (b) the social crisis[ii] and (c) the loss of legitimacy of all traditional religious and other value systems. Krüger (2018, p. 2) maintains that traditional religions have not only lost the right to claim moral leadership of society, but that they are, in fact, all in crisis. He concludes: "Humanity has entered a new kind of culture, global in spread but shorn of ultimate meaning" (2018, p. 2).

All of this spells dire consequences for how we reflect, as scholars, on the concepts of religion, philosophy of education, as well as the relationship between them. For one thing: religious traditions and religiously motivated people continue to this day to be important actors in civil society and they have, by no means, suddenly gravitated to the neutral zone. Secondly, religious traditions, including religious worldviews and convictions, have a tendency to act themselves out and to impact upon the global stage. At present this particular global stage is being populated with increasing numbers of interlocutors who all claim to be representing some or other social grouping – a process of social jostling which, instead of reconciling and uniting humanity, accomplishes exactly the opposite, namely to divide humanity even further.

It is against this backdrop that Gabriel (2017, p. 317) claims that because the majority of people on our planet are religious, the above-mentioned dialogue more often than not implies *interreligious* dialogue. She fittingly points out that there are increasing doubts and growing disappointment among scholars worldwide as to

whether any form of interreligious dialogue can really live up to these high expectations that it continues to raise. To put this in perspective, I suggest in the next paragraph that we rethink the notion of postmodernism.

Postmodernism and the role of narrative

Loughlin (1996) and Braun (2019, personal communication) explain that there are essentially two versions of postmodernity, namely a nihilistic and a religious one. This theory confronts "secular" postmodernity by drawing on (pre-rationalistic) interpretations of, amongst others, the work of non-foundational theologians such as Karl Barth, George Lindbeck and Hans Frei (who are regarded as narrative theologians) (Loughlin, 1996, p. 33). These four thinkers all favor a religious version of postmodernity that makes use of postmodern insights in order to re-describe the world narratively and, in the process, to link it up with the symbolic realism of ancient religious wisdom. Compared to religious postmodernism, nihilistic postmodernism is believed to condemn humanity, eventually, to endless violence. It sets the world against the Void[iii] (Braun, 2019, personal communication) and it remains rooted in the modern narrative of autonomous human emancipation from the divine (Loughlin, 1996, p. 25). According to Cupitt (1991, p. 93) this is why it ultimately leads to nothing. Religious postmodernism, instead, is a postmodernism of unending hope. It imagines the possibility of harmonious difference and peace.

Even though nihilistic postmodernity seems to have deprived the master narratives of the past of their power to prescribe to their adherents what they should be ascribing or attaching value to, it nevertheless caused the resultant value-gap to be filled in by the values that individuals could obtain for themselves by "shopping around" in the ever-expanding "value supermarket" (Potgieter & Van der Walt, 2015). This means that nihilistic postmodernism has managed to convince a growing number of people of the perceived need to navigate a mélange of value systems. As a result, the individual's own, personal life- and worldview became merely one among many (Loughlin, 1996). It would seem that everyone not only has a worldview, but also the right to it (Smith, 2006).

Master-narratives are essentially all-comprehensive. This fact is significant, because there are still those who, against the background of religious postmodernity, continue to narrate religious narratives (Loughlin, 1996). An example is the fact that the mainstream Christian churches across the globe continue to embrace the Augustinian theological narrative of creation, fall, and redemption. Although this narrative continues to this day to place human beings within the drama of God's created, fallen, and redeemed world, others have succeeded in presenting transformed stories in modernity: "Marxism places us within the unfolding dialectic of history; Darwinism writes us into the epic of evolution; Freud locates us in the theatre of the psyche" (Loughlin, 1996, p. 8).

Try as it might, postmodernity cannot escape the master narratives, for by telling our own, individual stories among the ruins of former master narratives, we, as well as the stories themselves, still presuppose a deep, reflective understanding – a Woodsian[iv] "knowledge in the blood" – of everything prior to it in order to establish our place in the world and to argue convincingly in favor of it (Lyotard, 1992). This is important, because postmodernity's suspicion towards master

narratives presupposes not only an understanding and evaluation of such narratives, but also that postmodernity itself creates an alternative master narrative, thereby contradicting itself (Braun, 2019, personal communication). As the reformational philosopher Strauss explains, "The reaction of postmodernity against such totality perspectives evinces a lack of understanding of the *conditions* of human thinking" (Strauss, 2009, p. 57).

It is clear, then, that by rejecting the modern project of emancipating human beings through the light of universal reason (Vanhoozer, 2003), nihilistic postmodernity is, in fact, oxygenating religious postmodernity, because it re-opens the "world" toward its pre-rational foundations. In doing so, it frees up the space for anyone to start narrating new, truthful stories about what should be pursued as most meaningful in life and why. Religious postmodernity, it seems, is in fact contributing to a steady increase in global attempts at rethinking the significance of religion in the public sphere and, by logical inference, in education as well (Jacobsen & Jacobsen, 2012; Braun & Potgieter, 2019).

The fact that the main precursors of nihilistic postmodernism were passionate critics of traditional religion and that they all happened to live during a time when traditional religion was still a dominant cultural force, indicates that religious postmodernity could only have emerged through an interaction with religious narrative and its historical (dialectical) relationship to, for example, Greek philosophy. Their main contributions (Stanford Encyclopedia of Philosophy, 2016) are therefore intrinsically linked to the symbolic network of their time, which cannot be properly understood in isolation from their religious heritage – a heritage that had been communicated through narrative.

Narrative re-describes the world as a world that is open to the future, while never losing its connection to tradition. Because the interplay of innovation and sedimentation is derived from narrative schematisms that constitute tradition (Ricoeur, 1984, p. 77), narrative is an antidote against traditionalism. It possesses the power to reconfigure our temporal experience constantly through the work of us humans' productive imagination. In Ricoeur's sense, tradition is therefore not a dead deposit of material but "…the living transmission of an innovation always capable of being reactivated by a return to the most creative moments of poetic activity" (Ricoeur, 1984, p. 68).

A nihilistic version of postmodernity that antagonizes religion (i.e. as a pre-modern and auto-legitimizing ancient tradition, according to its reputed nature) ultimately fails in fulfilling its potential to become post-secular and to overcome the secular illusion of religious neutrality (Taylor, 2007; Braun & Potgieter, 2019). This failure to overcome the secular illusions of religious neutrality is essential to the field of philosophy of education, for "there is no neutral, non-formative education; in short, there is no such thing as a secular education[v]" (Smith, 2009, p. 26). This is why a postmodernism of unending hope needs also to rethink the meaning of religion and what we now believe to be most meaningful in life and why.

Rethinking the meaning of religion

Religion reflects two orders of relevance and in order to rethink the meaning of religion, we need to contemplate beyond religion's first-order of (horizontal) relevance (Krüger, 2018, p. 2), namely the progressively artificial, insincere, short-

term and immediate attempts at gaining social leverage by gathering as much of life and the world as possible (Krüger, 2018, pp. 2, 5). The normative teachings, socialising rituals and disciplinary ethics (Krüger, 2018, p. 5) of organized religion represent, at most, the societal outside of the human search for ultimate meaning.

According to Krüger (2018, p. v), a second order of (vertical) relevance of religion emerges from humankind's search for the furthest, most inclusive horizon, the domain of silence, which underlies all of our most primordial religious and metaphysical urges. This is essentially an individual quest, not a collective enterprise (Krüger, 2018, p. 5) that attempts, in the Kantian way of "pushing through to the root of things" (Krüger, 2018, p. 2), to relativize all human claims to exclusive, absolute truth that might be proclaimed by any religious or metaphysical, mystical position. It frees up space for not only hospitably inviting, but also affirming the unique value and dignity of each. This kind of "pushing through to the root of things" moves beyond all possible stances of enmity, indifference, syncretism or homogenisation of all:

> It affirms ... that each religious, mystical and metaphysical orientation in its relative singularity represents or contains the whole and derives value from that, and that each represents or contains every other. This homoversal solidarity stimulating individual uniqueness is different from and in fact implies criticism of the process of globalization. (2018, p. v)

In light of the above, a new understanding of the concept of r*eligion* is emerging. As opposed to the three rather saddle-backed semantic values of religion, namely (a) awareness of the divine (from the Latinate *relegere*), (b) being bound to the divine (from the Latinate *religare*) and (c) worship of the divine (from the Latinate *religio*) (Diedericks, 2015, pp. 25, 27), we may now understand religion as world orientation with an exceptionally radical and integral intention (Krüger, 2018, p. 5). This means that, according to its second order of relevance, religion is essentially about the individual pilgrim's journey of continued search for and experience of unity or non-duality with the ultimate dimension of cosmos and existence; an individual pilgrim's continued compass-swinging in the world with reference to a transcendent source of meaning (Krüger, 2018, p. 7).

The pilgrim, the narrative and the threshold

The background provided above, suggests that, in terms of the work of narrative, it remains the individual's responsibility (and not some or other group's or collective's responsibility) to bring forth a synthesis, a plot, which brings together scattered events, goals, chances and causes into the whole of a complete story (Ricoeur, 1984, pp. ix-x) of the pilgrim's continued search for a peaceful, understanding silence – a 'learned ignorance' (*docta ignorantia*) – about the ultimate horizon where serious talking, religious and otherwise, finally expires (Krüger, 2018, p. xix) and where humble understanding starts to incubate.

The archetype of the pilgrim is the perfect circumscription, according to religious worldviews, of the limited human condition with regard to knowledge. Pilgrims have no permanent city on earth and this means, symbolically speaking, that although humans explore and expand their territory, building culture and setting up "walls" to protect themselves from unexplored threats (i.e. their own, personal dragons), they are obliged to keep negotiating the liminal threshold between the

known and the unknown. Every action and thought of the pilgrim in this space is thus adding to and developing the plot of his/her personal narrative. Despite dwelling in this narrative space between order and chaos, on the verge of a continued search for and experience of a transcendent source of meaning (Krüger, 2018, p. 7), however temporary, the pilgrim is never quite alone.

To keep pushing through to the root of things, the pilgrim is obliged to keep meeting and conversing with the Other. Because the pilgrim has deliberately chosen to move beyond all possible stances of enmity, indifference, syncretism or homogenisation, it stands to reason that by virtue of his/her meeting and reaching out to the Other, their own narratives are continuously expanded upon. The ethics of the pilgrim are therefore circumscribed by means of vulnerable hospitality. It speaks for itself that this kind of authentic (or vulnerable) hospitality should not only be about the pursuit and expression of benevolence and charity to the Other *per se*. Instead, vulnerable hospitality can only be activated when both the pilgrim-as-host and the Other-as-stranger-and-guest profoundly understand that they are both obliged to switch places (both physically and mentally) and be willing to resign oneself to the other (Fewell, 2016, p. 347).

By telling and re-telling the stories that we have accumulated on our journey as pilgrims, we can finally start to move away from the potential conflict of, for example, interreligious dialogues and public debates where the first-order, social leverage-aim of any argument or discussion is very rarely progress and enlightenment, but victory, instead. This has a wide variety of implications for any future, narrative vision of Philosophy of Education.

Conclusion

Philosophy of Education should involve, amongst others, thinking about fundamental questions such as:

- What should the aim of education be?
- Who should be educated?
- What should be taught and should this differ with interests and abilities?
- How should we be educated?

This paper suggests that if we are really interested – globally as well as locally – in helping to introduce a new pedagogy of hope and reconciliation worldwide, we have little choice but to rethink, re-imagine and transform our paralyzing and asphyxiating dependence upon the kind of normative teachings, socializing rituals and disciplinary ethics that are produced by our continued, irrational devotion to religion's first order of relevance – the kind that frantically searches for opportunities to gather as much of life and the world as possible (Krüger, 2018, pp. 2, 5), instead of helping the individual pilgrim to search for the furthest, most inclusive horizon, the domain of silence, which underlies all of his/her most primordial religious and metaphysical urges. Instead of socially dividing dialogues and debates, a new philosophy of education should be interrogating the possibilities of glocalised pedagogies of narrative; postmodernally grounded in a kind of vulnerable hospitality of unending hope that could accompany every serious, focused pilgrim towards imagining – and, eventually operationalizing – the possibility of harmonious and peaceful coexistence.

A future, narrative philosophy of education should, for example, also recognize that mountains, rivers and forests are the prime language of the pilgrim's journey. Moses on the mountain, Guru Nanak in the river, Dante in the dark wood, Jesus on Golgotha, and countless other examples, all provide us with plots and sub-plots for our personal narratives (Chater, 2018). Stories are, indeed, a key way in which all of us can encounter evil safely. Let us hope for a future where most people might have their first encounter with evil through a story. Narrative is a safe, yet vivid, threshold from which to observe threat, jeopardy, and the harm it can do (Chater, 2018). It is also the liminal portal through which we might detour towards a transcendent source of meaning.

Acknowledgements

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[i] Nihilism is the philosophical viewpoint that suggests the denial or lack of belief towards the reputedly meaningful aspects of life.

[ii] The product of political transformation processes, such as the rise of populism, the rise of neo-nationalism, the increase in various attempts at challenging and influencing global thinking about, *inter alia*, democracy and capitalism, the global upsurge of a "post truth" epistemology, the collapse of norm structures, moral decay, social instability, violence, socially unacceptable behaviour such as corruption, state capture and a collapse of discipline in general and in schools, an unceasing rise of in-group and out-group thinking, a continuous shift in political power relations, territorial and land (-grab) claims, as well as military and anarchist threats are now endangering the lives and livelihood of more people in more countries of the world than ever before in the history of humankind. Social cohesion in – especially Western – societies is dwindling fast (Zieberts, 2019).

[iii] The Void is just movement, change (Cupitt, 1991, pp. 61, 95).

[iv] MacDara Woods wrote the celebrated poem: 'Knowledge in the Blood'. The book, *Knowledge in the Blood*, by Jonathan D Jansen, takes its title from this poem by Woods.

[v] Recently, the importance of narrative for religious thought in a postmodern context continues to be promoted as a means of transition beyond postmodern relativism and towards a type of religion which prioritizes truthful narration over truthful reason (Watson, 2014).

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The Effectiveness of Task-based Language Teaching to ESP Bachelor Students at Two Universities in Bulgaria and Romania

Abstract

This paper aims at analyzing and comparing the approach of Task-based language teaching (TBLT) to bachelor students taking classes of English for Specific Purposes (ESP) at two universities in Bulgaria and Romania. The outcomes of the research show that both Bulgarian and Romanian students express their favorable preferences towards using this approach. This is a case study implemented on a local level in two neighboring countries in the region of Southeastern Europe.

Keywords: communicative competence, tasks, Task-based language teaching (TBLT) approach, English for Specific Purposes (ESP), Bulgaria, Romania

Introduction

Undeniably English is the main language of technology, media, business, international marketing, and advertising, and as such, has become a global language (Bogachenko, 2016). This trend has led to an increased demand for fluency growth in English which has become crucial for job opportunities and professional realization. The hegemony of English as a first foreign language in Bulgaria and Romania has been really strong since the Fall of the Berlin Wall in 1989 and by far reinforced after the accession of both countries to the European Union (EU) in 2007. In 18 education systems, English is a compulsory language (including Bulgaria and Romania) that all students must learn at one point during their compulsory education (Baïdak et al., 2017, p. 9).

In line with these EU recommendations, the authors of this study have chosen to analyze and compare the effectiveness of the **Task-based language teaching (TBLT) approach** in teaching **English for Specific Purposes (ESP)** to bachelor students of their university majors of Information Technologies and Tourism in Bulgaria and Economic Sciences in Romania as a logical and most appropriate teaching method adequate for the contemporary university settings, learners' English language needs, and their professional realization on the job market.

Task-based language teaching (TBLT) approach

Many researchers and teachers alike are committed to improving the quality of teaching English and among the various theories, methods and approaches of teaching and learning that have emerged TBLT deriving from the communicative language teaching approach has become rather popular in the last two decades in spite of certain controversies.

The TBLT approach is regarded as an appropriate means of teaching ESP in this study, because it places emphasis on the **meaning** rather than the language form and **task-based** activities offer students an opportunity to develop cognitive processes.

The present study takes as a prerequisite the definition of a "task" as explained by Willis (1996) in his *Framework for Task-based Learning*: tasks are activities where the target language is used by the learner for a communicative purpose (goal) to achieve an outcome (p. 23).

According to Nunan (2004), tasks may be divided into target tasks (real world ones) and pedagogical tasks. Target tasks are similar to those activities that learners have to do outside the classroom. Pedagogical tasks are those that have been designed to be suitable for the classroom setting. David Nunan's definition of a pedagogical task, expressed in his *Task-based Language Teaching* (2004), is quite comprehensive. According to him, it is a "piece of classroom work that involves learners in comprehending, manipulating, producing or interacting in the target language while their attention is focused on mobilizing their grammatical knowledge in order to express meaning, and in which their intention is to convey meaning rather than to manipulate form" (p. 72). In order to express different communicative meanings, students do have to resort to grammar, so meaning and form are obviously interrelated.

TBLT emphasizes the fact that learning should be an active and interactive process; it should not be based on mere transmission of knowledge from teacher to learners and it should encourage the students to learn collaboratively in small groups.

Researchers commonly agree that language learning should be based on communicative interaction, the task involving language used in the real-world and conferring authenticity to classroom communication. Based on an experiential "learning by doing philosophy", TBLT bridges the gap between class and real life, changing the roles of the teachers from instructors to guides or assistants and placing the students at the core of the learning process. As participants share their knowledge, experience and opinions, they can use the language effectively, be exposed to new input and constantly improve their language skills. As a learner-centred approach TBLT draws knowledge from the learner, considers his needs and uses tasks according to these aspects. It is a permanent negotiation between the teacher as facilitator and learner in their collaborative relationship.

There are other numerous advantages to elaborating this approach in class, too: by devising communicative tasks, TBLT increases learners' real language use; it is a learner-centered approach; while learning students cooperate, they can interact during their common effort of performing a task; if they see they can communicate effectively, their motivation to learn is increased; authentic texts are used in the learning process; the selection is based on students' needs and, last but not least, students have the opportunity to focus on the learning process itself, not only language.

Context

Country profiles: Bulgaria and Romania

Bulgaria and Romania are border countries divided by the river Danube to the northern part of Bulgaria and to the southern part of Romania. Both are situated in the region of Southeastern Europe. Bulgaria's population is 7,057,504 (July 2018 est.) and Romania's population is three times bigger – 21,457,116 (July 2018 est.). In the first country Bulgarian is the official language (76.8%), Turkish (8.2%), Romani (3.8%), other (0.7%), unspecified (10.5%) (2011 est.) (The World Factbook, 2018a). In the second country Romanian is the official language (85.4%), Hungarian (6.3%), Romani (1.2%), other (1%), unspecified (6.1%) (2011 est.) (The World Factbook, 2018b).

The percentage of people speaking at least one foreign language in Bulgaria is 49.5% (NSI, 2017). In Romania the percentage of people who can converse in a foreign language is 48%, English being the foreign language that most Romanians speak (31%), followed by French (17%). University graduates in Romania represent 15.1% of the country's active population, according to the Social Monitor of the Friedrich-Ebert-Stiftung Romania Foundation (2017).

The status of teaching ESP at universities in Bulgaria

There are not general requirements for choosing to teach ESP instead of teaching General English at Bulgarian and Romanian universities. It is up to the teacher to choose which mode of teaching they can imply in their day-to-day teaching practice.

ESP is predominantly taught in many universities in Bulgaria preparing students for the applied, technical and business sciences, for example at The University of Forestry; Todor Kableshkov University of Transport; University of National and World Economy; University of Architecture, Civil Engineering and Geodesy; Varna University of Management, N. Y. Vaptsarov Naval Academy in Varna; University of Library Studies and Information Technologies, etc.

Most often ESP courses are developed for intermediate or advanced learners, specific use of vocabulary, grammar and functions always depending on previously acquired competence, which we deem, should be assessed at least at B1/B2 level according to the Common European Framework of Reference for Languages (CEFR) to allow a successful curriculum design (Ruzhekova-Rogozherova, 2015, p. 42).

The status of teaching ESP at universities in Romania

In Romanian academic institutions it is compulsory to study at least one foreign language, mainly English and predominantly ESP. The syllabus for ESP taught in Romanian universities is drawn according to the professional needs of their students and to the requirements of the labour market. University of Bucharest, The Babes-Bolyai University of Cluj-Napoca, Alexandru Ioan Cuza University of Iasi, West University of Timisoara are just a few of the public institutions of higher education with a long and distinguished tradition in teaching foreign languages. The students are expected to have at least an intermediate level B1 according to the CEFR and those majoring in economics and business are studying mainly business language and vocabulary.

In both countries teachers have undergone their formal higher education in English Philology or Applied Linguistics and are expected to have an interest, although sometimes slight, in the specific area of studies of their students.

Objectives of the study

- To analyze the effectiveness of TBLT approach to ESP bachelor students at two universities in Bulgaria and Romania;
- To compare the effectiveness of TBLT approach to ESP bachelor students at two universities in Bulgaria and Romania;
- To improve the use of TBLT approach to ESP bachelor students at the home universities in Bulgaria and Romania by using the comparative data from the research.

Research methodology

This paper aims at examining the attitude of bachelor students at tertiary level of education towards task-based language teaching and its effectiveness for learners. The authors of the study who have kept contact electronically via e-mails have obtained data from 52 students at the Faculty of Economics of the "Constantin Brancusi" University, Targu Jiu, Romania in the third year of studies and the equal number of bachelor students at the Department of Comprehensive Studies of the University of Library Studies and Information Technologies, Sofia, Bulgaria who are studying English during the first and second semester of their first and second year of studies at B1-B2 level of language knowledge according to the CEFR. The data resulted from a questionnaire including 25 closed-ended questions under 5 subcategories (I Methodology; II Tasks; III Communicative competence; IV Student-centeredness; V Personal improvement) regarding the effectiveness of TBLT and its impact upon the students' performance. Students answer individually choosing from options *Yes*, *No*, or *I don't know*.

Findings

Romania

I Methodology:
Most of the participants in the study declare that they enjoy modern methods of teaching English based on communication instead of traditional ones focusing on reading, grammar or translation. The participants consider that TBLT help them to improve their speaking skills and it is thought to be entertaining.
II Tasks:
Seventy per cent of them prefer authentic texts from magazines, newspapers, course books and do not agree to the idea of having specialized texts translated into English. Even a greater number of them prefer performing tasks which are a reflection of real-life use of the language in their specific area of studies. Task activities are considered to be a good way to improve English vocabulary in the students' specific area of studies by 84% and 85% of them think that they support and develop their language needs and professional interests.
III Communicative competence:

Most of the participants like engaging in communicative tasks (96%) and, surprisingly, they acknowledge its importance in communication (98%). However, instead of completing purely grammar exercises, they prefer to speak more and appreciate a teacher who encourages them to do so (88%). The participants admit that fluency is more important for them than accuracy (70%) and express their opinion.

IV Student-centeredness:

Equal numbers show that TBLT help students to express their own ideas about the topic of the lesson without being interrupted by the teacher (75%) but they do not like to complete a task without any input or guidance from him or her (76%). The students like pair work and group work during their English classes and 84% of them feel comfortable when talking to their colleagues in English even if not all of them had been exposed to this method before and their perception was possibly affected by their previous experiences of learning English. However, we have noticed that those students who are more proficient tend to monopolize the group or pair work activities.

V Personal improvement:

On the other hand, TBLT is thought to contribute to the students' personal improvement since 77% consider that it helped them to develop personally; 85% think that it helped them to cooperate with others; it increased their motivation to learn English (94%) and advanced their critical thinking (84%), contributing to their professional realization in their specific area of studies (86%).

Bulgaria

I Methodology:

More than half of the students (67%) prefer the traditional methods of teaching focusing on reading, grammar or translation whereas the preference for the modern methods of teaching based on communication comprises 77%. The communicative method of teaching through oral or written tasks is appreciated by 75% who consider that it encourages learning. The participants consider that TBLT assists them to improve their speaking skills (86%) and it is thought to be entertaining by 61%.

II Tasks:

Thirty-three per cent of the students are inclined to use specialized texts translated into English compared to 38% who prefer authentic ones and the rest (29%) have no definite idea. A much greater number (85%) prefer tasks which are a reflection of real-life use of the language in their specific area of studies. The same tendency applies to their English vocabulary improvement and language needs and professional interests (80%).

III Communicative competence:

More than half of the students like being engaged in communicative tasks (62%) and prefer a teacher who encourages them to speak more (65%), although they think that grammar is important to communicate effectively (62%). However, less than a half of them admit that accuracy is more important (46%) and 56% feel that TBLT helps to express their personal opinion.

IV Student-centeredness:

Only 52% feel confident to express their own opinion and struggle to complete a task without any guidance from the teacher (50%). Positively, they like pair and group work (80%), and not so convincingly answering the teacher's questions (50%) as well as talking to colleagues in English (54%).

V Personal improvement:

Answers show that students are not really certain whether TBLT approach can contribute to their personal development, cooperation with others, motivation increase to learn English, and professional realization in their specific area of studies because the results are between 34 and 38% in contrast with the lowest level of critical thinking improvement of only 24%.

Discussion

Unlike the Romanian students who opt for the modern methods of teaching English based on communication quite convincingly and appreciate it through oral or written tasks, their Bulgarian counterparts seem to still have a stronger preference for traditional methods, although they also express their positive attitude towards the modern communicative ones and find encouragement in completing such tasks. While both groups of students in Bulgaria and Romania suggest that TBLT approach improves their speaking skills, Romanian participants enjoy it more to the fullest.

Bulgarian students are slightly confused about the importance of using authentic texts unlike the Romanian participants; however, both groups prefer performing tasks which are a reflection of real-life use of the language in their specific area of studies. Both Bulgarian and Romanian students consider task activities to be a good way to improve English vocabulary in the students' specific area of studies and think that they support and develop their language needs and professional interests. Romanian students appreciate to a greater extent a teacher who encourages them to speak more instead of completing purely grammar exercises. Moreover, Romanian participants are more confident in expressing their own ideas about the topic under discussion during classes compared to the Bulgarian ones, but the latter are striving for more independence in task completion. Both groups like pair and group work during their English classes, although Bulgarian students don't like sharing ideas with colleagues unlike their Romanian counterparts.

Quite contrary to the Romanian learners who think that the TBLT approach would contribute to their personal development, motivation for learning a foreign language and critical thinking, the Bulgarian participants are rather reserved towards these methods' positive effect on these characteristics.

Limitations

One limitation of the study refers to the small number of participants and further studies may be done on larger groups in the future, in order to demonstrate the feasibility of the TBLT approach from the students' perspective. Another limitation may be the subjective character of the students' responses which may affect the quality of the study itself. It would be interesting to develop further studies both on larger numbers of students and on ESP teachers from Romania and Bulgaria to give their perspectives and attitudes towards using TBLT at tertiary level.

Conclusion

The questionnaire, designed for our students, was created in accordance with the objective of the study and the information contained in the theoretical framework and included closed-ended questions about TBLT methodology and its efficiency in teaching English. The data in the questionnaire were analyzed in figures, percentages, interpretation and discussion. Based on the findings resulting from research, we drew the conclusions and recommendations.

The findings in this study provide information that can be applied to other students at tertiary level about their perceptions regarding TBLT in English classes, revealing the following implications.

Even if the traditional methods used by some of the students' previous teachers may have affected their perception of language teaching, the participants in this study seem to enjoy the modern ones more. TBLT is based on the principle of engaging students in communication. It is obvious, then, that task-based methods can help learners to better interact with one another and the teacher and to build up confidence in using English.

The purpose of this study is to examine the effectiveness of TBLT in English classes. The information collected clearly indicated that the students had an overall positive attitude towards TBLT, considering that it increased their motivation for learning English and that they can improve their language proficiency by being exposed to such methods.

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A Centralised Model for Design, Delivery and Governance of Open Distance Learning at Dual Mode Universities

Abstract

In response to global and local needs, the South African government increasingly enables distance education through legislation and policy, and many traditional public higher education institutions have turned to dual-mode delivery of their programmes. This decision is often based on a desire for new market growth and firmly embedded in for-profit, without necessarily being driven by strategy. A problem with this approach is that faculties intending to offer distance delivery at dual-mode institutions often do so in a decentralised and fragmented manner, assisted only by a university unit tasked with technology enhancement of contact programmes. In such a model of decentralised delivery, for various reasons, problems with quality and sustainability arise. As an emerging dual-mode institution, the University of the Free State (UFS) considered alternatives to its decentralised and uneven governance of Open Distance Learning (ODL), towards enabling a balance between for-profit and quality. After years of using different governance models, the UFS subsequently adopted and refined the Enterprise Model as a solution.

Keywords: open distance learning, ODL governance, centralised versus decentralised distance education delivery, Enterprise model, standardization, sustainable ODL

Introduction

Globally, there is a need to level the playing field in terms of higher education opportunities, and to use innovative ways to provide access to education, inter alia through distance education (DE) programmes. In South Africa, only one of the current 26 public higher education institutions (HEIs), was designed from the onset as a DE institution. Increasingly, due to infrastructure and human resources limitations, the capacity at conventional face-to-face HEIs do not meet the needs in the society. In response, the South African government progressively enables distance education through legislation and policy, by allowing those conventional HEIs to also enter the distance education field. Subsequently a growing number of traditional public higher education institutions have turned to dual-mode delivery of their programmes. The Commonwealth of Learning (2002, p. 42) explains dual mode institutions as providing "both conventional face-to-face education and distance education". The addition of distance programmes to the qualification mix at these former conventional on-campus institutions, is often based on a desire for new market growth and firmly embedded in neo-liberalism, and not based on fundamental changes to philosophy, pedagogical principles and policy.

Against this background, and as an emerging dual-mode institution, the University of the Free State (UFS) has gone through different stages to adopt a suitable governance structure. Involved, primarily in a leadership position, for two decades, I have been part of the process to explore alternative modes of governance,

towards improvement. The aim of this paper is therefore to interrogate the evolvement of ODL governance at this institution within the emerging body of knowledge as a possible solution to the stated problems, not only in the context of South Africa, but in a rapidly changing global higher education environment.

I thus share the journey through three modes of governance, to the point where we function as the UFS South Campus for ODL (SC) today.

A decentralised faculty-driven model

I became involved in ODL before the start of this century, through a faculty-driven piece-meal design distance education endeavour, involving a selection of education programmes introduced by the faculty of which I was part. In this model, faculty members within the different departments were wholly responsible for the design; development; facilitation; student support; budgets; materials distribution and registration. After a while, the faculty set up a single administrative office, still working with support staff in the academic departments. In due time, this evolved into the School of Continuing Education, where the administrative support for the ODL programmes was consolidated, while the faculty members remained involved but situated in traditional academic departments, within a matrix organisational structure.

Although initially there was enthusiasm and commitment on the side of faculty members, this dwindled as we started facing challenges such as administrative overload; institutional policies that were not aligned with ODL principles, no centralised coordination of ODL and no ODL strategy. ODL programmes were largely developed in an uncoordinated fashion, isolated from each other. My observation was that there were different standards for face-to-face and ODL programmes, although nothing was documented. It became increasingly clear that ODL was not part of core business, resources were lacking, budgets were not aligned and the commitment of staff was not systemised.

Literature suggests that upon entering into dual-mode provision, distance education is often decentralised to the faculty or department that takes sole responsibility for the design and the delivery of their DE programmes (Xiao, 2018). They have the vested authority to decide which programmes will be designed in ODL mode, how it will be delivered and by whom (Forsyth et al., 2010). In such a decentralised autonomous structure, administrative responsibility for delivery also lies within the faculty, and economies of scale are limited by the capacity of individual academics (in the faculty) to handle large student numbers and multi-faceted delivery. Daniel (2012, p. 90) cites Tony Bates who refers to such a model as the "Lone Ranger" approach, which, for various reasons, does not lead to sustainability and consistent quality of distance education offerings. Forsyth et al. (2010, p. 24) likewise argue that in a decentralised mode, commitment of staff is not systematised at an institutional level and can have a negative effect on the sustainability and quality of the programme. In this model, individual academics might be supported in the design of ODL programmes by an in-house division specialising in design and development of technology supported and enhanced learning (e.g. an eLearning unit). This does not mean that the online programmes are designed or delivered by such a division; they merely assist academics with the design of the programmes, but the department and Faculty is responsible for the

delivery, which includes facilitation as well as support of the distance students. It also does not mean that the said division has expertise in terms of distance education. Apart from design and development of materials, effective management and administration of ODL in a decentralised model also means that Faculty will take responsibility for the allocation of human and financial resources, management of budgets, the selection and appointment of facilitators; registration; supervision; materials distribution and marketing (The Commonwealth of Learning, 2002; Khakhar, 2010; Xiao, 2018). However, the amount of work that is involved in the delivery of ODL programmes is often underestimated as academics or coordinators have to design assessment; train facilitators; take control of the development and distribution of materials; monitor quality and support students. Furthermore, most individual Faculty members do not have the skills and ability to design and offer quality pedagogically sound distance education programmes (Xiao, 2018; Forsyth et al., 2010) and thus quality is questioned.

At institutional level, there is often a lack of understanding of the different approaches required by face-to-face and distance education delivery, and subsequently policies and practices are merely drawn from current practices, instead of ODL principles (Xiao, 2018). Similarly, institutional planning mostly are misaligned with ODL principles, and institutional culture as well as central infrastructure mostly do not support ODL (Forsyth et al., 2010; Khakhar, 2010). Subsequently programmes are developed in isolation with each other instead of within the larger institutional strategy which means that there is no common set of standards for design and by implication, also for delivery. As such, distance education programmes are not developed as an integral part of the university's teaching mission (Forsyth et al., 2010). Without the support of an organisational structure and culture the assurance of quality distance education in a dual-mode institution is problematic. All of the above impact on quality. Forsyth et al. (2010) emphasise that it is not the availability of web-based technology that provides quality distance education at a conventional institution, but rather centrally set standards for distance education provision.

A centralised administrative model, with faculty-driven authority

With increasing pressure to produce research outputs and to handle large classes and large numbers of postgraduate students, academics in our faculty became less and less enthusiastic about their involvement in ODL. A decision was taken to centralise the administration and coordination by an ODL unit, and the School of Open Learning was established. The UFS SOL followed what is still the most popular version of ODL governance nationally and internationally. The SOL was tasked to oversee the effective administration of programmes, and SOL became the repository of knowledge on ODL, not only in practice, but also in terms of policy and theory. Like in many cases around the world, total academic control was still vested in faculty, and that came with inflexibility and restrictions. Although most responsibilities were situated within the SOL, we had no power beyond enrolment and administrative procedures, and often those were met with resistance. Although we were able to centralise admin, we remained an extension of one specific faculty, where there was no faculty or institutional ODL philosophy. The effect, however,

was that faculty members did not see themselves as part of ODL programmes any more. We thus functioned as a toothless entity.

The experiences of SOL were mirrored in the literature with regard to units centralised at faculty or institutional level. Osei, Dontwi and Mensah (2013) sharing experiences at a unit centralised at institutional level, indicated that there was no difference in terms of the content of the policies for conventional modes of delivery and distance education delivery (also Boyd-Barrett, 2000; Makoe, 2018). This leads to uncoordinated programme delivery, as faculties take final decisions, inter alia in terms of standards and content (Croft, 1992) even though they usually lack ODL expertise (Hope, 2005). The consequence is inappropriate educational and business models (Pankaj, 2017). Institutionally and in faculties, there is little understanding of the cost involved to deliver quality ODL programmes (Hope, 2005) nor of how to align institutional processes and structures (e.g. library services, registration, etc.) with the needs of adult working students (Croft, 1992). Hope (2005) points out that there is often relational problems between faculties and such central units. ODL activities and responsibilities have little status, are not considered for promotion purposes, and their workload is seldom acknowledged (Croft, 1992; Hope, 2005). It is not considered as the core business of the institution but rather as an add-on (Croft, 1992; Boyd-Barrett, 2000). Lack of clear strategy, quality assurance mechanisms and quality assurance standards inevitably lead to poor quality (Boyd-Barrett, 2000; Pankaj, 2017). Hope (2005) believes that a centralised governance system, where ODL is divorced from institutional culture, practice and policy is setting up DE students to fail.

In a centralised faculty-driven model the design and delivery of distance programmes are inhibited by resistance from academic staff. We realised that these challenges could only be addressed through an institutional mandate to the centralised ODL unit.

Enterprise model, with centralised authority and faculty collaboration

Based on the enterprise model of Lowenthal and White (2009), Open Distance Learning was established on the South Campus of the UFS in 2015, as a dedicated ODL space and niche area. This campus is geographically separate from the Bloemfontein campus and does not offer mainstream programmes. It provides for a centralised design for the development and delivery of ODL programmes, but with collaboration with faculties based on a continuum. Importantly, we have the mandate of top management to lead in terms of ODL, and this mandate is provided through policy to give us decision-making authority. Courses are developed collaboratively, taking into account issues such as availability of academic staff members, and faculties still have an oversight role to play. This model enabled us to establish protocols in terms of costing and budgets and standardisation, and to design our own procedures and adapt institutional policies for the ODL environment. We were able to develop structures within the institution to cooperate with the ODL unit.

Lowenthal and White (2009) points out that while there is no one distinct enterprise model, and institutions adopt it according to their own needs, certain features are identifiable. Firstly, there is *centralized administration and oversight,* (Lowenthal & White, 2009, p. 933) which means a single division for the

management and administration of all ODL programmes. It provides for greater oversight and control, can restrict the offering of programmes that are offered, based on a particular business model to ensure viability. Furthermore, it creates an environment for standardising and implementing appropriate quality assurance processes. Secondly, the enterprise model features *collaborative course design*, which is "the process of pairing an instructional designer and subject matter expert" in the design of the course (Lowenthal & White, 2009, pp. 934, 936). This feature combined the unique expertise of both individuals involved, but can also draw on other expertise as required. Thirdly, the model enables *standardisation* in terms of course design (Lowenthal & White, 2009, p. 934), which does not only provide for a standard layout that students get used to, but also infuses certain teaching and learning strategies fit for ODL. Lastly, the enterprise model includes *faculty assessment and training*, which transfers knowledge on ODL.

Added to this, at our campus, particular sub-systems were created, based on institutional principles.

Collaboration

Collaboration forms the basis for the ODL business model at UFS SC, and is part of the institution's long-term planning, vision and mission. In the first place, we collaborate at top management level, which provides and strengthens our mandate. Standardisation is part of the institutional strategy for ODL, while faculty collaboration is negotiated through memorandums of understandings (MoUs). Academic commitment is essential, and due to the limited human resource capacity on the UFS SC, we contract academics on long-term and ad hoc contracts. In our MoUs, weighting different tasks are clearly indicated, which promotes transparency. The minimum responsibility of faculties is quality assurance through moderation. Profits are shared according to weights of stakeholder input.

Sub-systems at UFS South Campus

Sub-systems created on the UFS SC is based on a strategic UFS decision, taking into account the UFS long-term planning. The campus principal is a member of the top management team, and oversees six different departments, including course design, a multimedia department and academic planning, which inter alia take responsibility for quality assurance. However in terms of content knowledge, we rely on academic staff, from faculties and the ad hoc appointments.

Lessons learnt

To enable dual mode institutions to successfully deliver ODL, sound governance principles is a prerequisite. This means that there must be a central organisational structure with vested authority, and institutional policies must be aligned to also meet the needs of ODL students.

In order to develop quality ODL programmes, the organisational structures should give guidance to faculties in terms of planning, design, delivery and quality assurance. To manage and overcome staff resistance clear contracts with faculty members or ad hoc staff must be entered into. Towards sustainable delivery, programmes must be cost-effective, taking into account economies of scale.

Conclusion

It was found that centralised governance of distance programmes at the Institution enabled a high level of standardisation of ODL programmes and led to sustained offerings. I can conclude that an Enterprise Model for the design and delivery of distance programmes is an option that enables universities to establish sustainable distance programmes. I subsequently recommend that a high level of standardisation and collaboration be established towards quality ODL. This implies that dual-mode universities should centrally customise its policies and practices to also include teaching and learning in a distance mode. In the end, effective governance of ODL can be attained only by a strategic decision at institutional level.

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Exploring Teachers' Notions of Global Citizenship Education in the US-Mexico Border

Abstract

The purpose of this study was to explore the notions that teachers in the US-Mexican border have about global citizenship education; the specific research questions were: do these notions refer to an education that leads to action? Or to an active sense of citizenship? Do these notions contain a global scope? It was expected that living in the border, their daily exposition to an international experience would lead notions to a global perspective. Five teachers of normal schools were interviewed, and their notions were grouped into three main ideas: with the highest consensus there were values; second, normative life; and third, some aspects related to community life. Although some of the findings express notions of an active citizenship, there was nothing related to a global scope of citizenship. The explanation could be that their notions of citizenship are highly influenced by local concerns about insecurity, leaving aside a global perspective.

Keywords: global citizenship, citizenship education, civic education, active citizenship

Introduction

According to Freire, alphabetization of adults requires meaningful problematizing issues taken from their daily life. In the discussion groups, adults and educators together, learn to read the world critically, to become aware of their conditions of oppression and to take group action for common liberation (Freire, 2005). Similarly, the dialogical possibilities of Ubuntu have "the potential to engender deliberative action" and "may contribute to enrich the learning processes and the pursuit of socially constructive learning outcomes" (Assié-Lumumba, 2017). Both perspectives assume learning as an outcome that leads to action for collective wellbeing, either in the form of liberation from oppression or in the quest for a positive handling of the environment. In both perspectives, there is a sense of belonging to a group, where identity plays an important role in developing involvement and commitment with the affairs of society. That is one of the main ideas of citizenship, either with a local or a global scope.

This paper explores the teachers' notions about citizenship in a city of US-Mexican border. The main research question is: do these notions refer to an education that leads to action? Or to an active sense of citizenship? Do these notions contain a global scope? The first section of the paper is devoted to review some theoretical elements about global citizenship education. The second section depicts the cultural context of the people living in the US-Mexico border, where the teachers interviewed spend their daily life. The third section describes the methodology for this exploration; and a last section dedicated to conclusions.

Foundations

There is not a unique concept of citizenship. Nevertheless, there are authors that have found that there is a generalized notion referring to *active citizenship* as a function of involvement in public life (Stuart, 2008). Although, considering the current changes of societies, such as the different types of migrations and the interconnectedness of communities, it is usual to find the coexistence of more than one form of citizenship, with different kinds of *active citizenships*, as well as individuals with "multiple citizenships", depending on their cosmopolitanism. Citizenship is a cultural concept.

Beyond the discussion of whether cosmopolitanism is in the lines of Eurocentric narratives, the raising international mobility of the current process of globalization has called the attention of all visions that focus human connectedness to cope with world issues; such is the case of *Ubuntu* and other social perspectives, like Chaos theory, or Complex thinking, that emphasize a sense of human interdependence. Within this wide approach is that the notion of global citizenship is brought about from different perspectives. Estellés & Romero (2016, p. 22) doing a review of the literature, have found that the discourses to global or transnational citizenship generally start from three premises: the first is supported in a cosmopolitan view (or stoic) that recognizes human beings from another states; therefore, education should focus on diversity and human rights; the second premise is related to economic, political and social globalization in which relations transcend national or regional boundaries and the educational focus is in the far reaching effects that social and economic decisions have across the planet, therefore education is to promote commitment to cope with global issues; the third premise assumes that globalization exerts supranational powers and therefore education citizenship promotes the participation in interdependent movements, such as social justice and equity, sustainable development and cultural diversity.

These three premises are mutually complementary and together can give a fair view, about the contribution of education to produce a comprehensive profile: "the persons aware of the world amplitude and their own function in it; they respect and value the diversity and understand the global economy and the social and political issues and are critical towards social injustice, get involved and contribute to the community at different levels, from the local to the global" (Stuart, 2008, p. 79). For a comprehensive view some divergences should not be left aside, like the ones identified by Torres (2015) between the concepts of solidarity and competitiveness; or between internationalization and globalization as found by Navarro-Leal & Salinas-Escandón (2018).

But even when there are slight divergences about some elements of the broad focus of global citizenship, there is a general understanding about the importance of citizenship education. An international comparison by Zaman (2006) of citizenship education policy and practice as they are perceived by teachers in the United States, England, and Hong Kong, found that there was a consensus in suggesting that civics education matters a great deal for students' political development and that teacher-centered methods dominate civics education classrooms, and also that political socialization in the form of knowledge transmission is the most emphasized objective in these countries' schools.

Borderlands

It would be easy to assume that in large cities with a high component of cosmopolitan population, people will be more acquainted with the global dimensions of civic education and on the contrary, for people living in communities with very weak international relations, citizenship will not go beyond a local view, because the sense of belonging is related to closeness. But what about the borderlands between countries? How does the sense of belonging affect the perception of citizenship?

During the last century, the US-Mexico border has been one of the most dynamic of the world; either in terms of demographic mobility or in terms of freight transfer. There are estimates that the exchange is worth one million of US Dollars per minute during last years. This economic dynamism, however, does not make it a more cosmopolitan territory. According to Giménez (2009) the border is an area where two cultures get in touch and that exceeds both sides of the territorial demarcation between the nations and does not necessarily produce a "blended" culture.

Borderlands is a conflicting place of exasperated identities, where dominant identities struggle to maintain hegemony, while subaltern identities struggle for social recognition, promoting cohesion and manifesting adhesion to traditions and symbols. Social groups within these areas come to build their own culture, with their own language, rituals, symbols. They defend their own culture from dominant cultures.

Method of inquiry

Interviews were made adopting the guidelines devised by Torres & Dorio (2015) for an international project of the UNESCO Chair on Global Citizenship Education. The subjects were five Mexican teacher educators linked to a Normal School in Matamoros, México, a twin city of Brownsville, Texas. Their names have been changed:

- Antonio is from Matamoros and after his graduation as a teacher he obtained a master's degree in Language and Communication. He teaches in a primary school at the outskirts of Matamoros and teaches at the private normal school. He lives in a neighborhood considered to be one with the best status of the city, located near the border bridge.
- Mariana came from Ciudad Mante, a city located to the south of Matamoros, about six hours by bus. She has studied pedagogy with a specialization in mathematics and teaches at the local public normal school.
- Eloisa is not from Matamoros, she came from a small city at about one hour by bus, with the aim to study and become a teacher; she succeeded and teaches in a private normal school. She has stablished her home in a neighborhood considered of a low status and characterized by dysfunctional families, as she states in the interview.
- Guadalupe was teaching during 20 years at the School of Education of the University of Texas in Brownsville, in charge of the bilingual courses for international students, and teaching the courses for those who have applied to

become US citizens and needed to sit for a federal governmental assessment. She is now retired and lives in the south of Corpus Christi, Texas.
- Delfina is a teacher who lives in Matamoros and for more than 18 years has been teaching in the public normal school of that locality, in charge of the curricular line of practical teacher training. She was studying a master's degree at the University of Texas in Brownsville, which was concluded in Matamoros, because of migratory matters, she is now enrolled in a doctoral program at a local university.

Results

This section presents a close synthesis of the interviews conducted in Spanish.

The first question they answered was: What is a good citizen? The answers were related to someone with values, virtues, love to the country and family, respect, responsibility, respect for others; to exhibit tolerance for difference, to be aware of rights and responsibilities, coexistence, to vote, commitment with society; the phrase "to be honest" was in almost all the answers.

The question about the meaning of an outstanding citizenship, all of them answered basically the same values as above, except for Guadalupe, who added that an outstanding citizen "is someone who always aspire to get some more". Meaning with that, someone who performs those values beyond the average.

In Spanish the word "compromiso" has different meanings, commonly it is used to refer either to an obligation or to a commitment. So, when they were asked about the difference between civic awareness and civic commitment, they answered that the former was "to know one´s rights and obligations" and that the latter had to do with obligations, as in obligations with patriot symbols and with community. In their words, civic commitment is related to a sense of active citizenship.

What does it mean citizenship education in the school? The answers were related to the promotion of values like equality, equity, tolerance, ethics, discipline. Eloise´s answer was slightly different: citizenship in the school is to follow the rules, to teach more than the minimum, to teach by example.

Is citizenship education promoted in your school?
- Antonio: yes, but is not reinforced by parents.
- Mariana: yes, fellowship, collaborative work, group agreements.
- Eloisa: respect, democracy, coexistence, honesty.
- Guadalupe: to become aware, that they do not steal.
- Delfina: because of insecurity, now we do not have community work at the school.

When asked if they promoted citizenship education in their lessons, their answers were positive, saying that they promote democracy when organizing for collaborative work, or team work and fellowship, honesty. For the community we organize civic acts and festivities.

Conclusions

The argument that has been structured from the theoretical departure of this study, is that action for collective wellbeing is a socially constructed learning outcome from a kind of education that develops involvement and commitment with

the affairs of society. Therefore, there is a link between a cultural sense of belonging to a group, or a community, and the notion of citizenship, either with a global or a local scope.

The purpose of this study was to explore the notions and scope of citizenship education that a group of teachers have in a setting such as a city in the US-Mexico border, since it was assumed that people exposed to an international daily experience would have developed a notion of citizenship education with a global scope. The subjects selected for interviews are not street people, they hold graduate education certificates and teach in schools for teachers (a public and a private normal schools).

What these teachers have expressed may be grouped into three main ideas: the strongest, or the one with a wider consensus, is related to values (respect, responsibility, honesty, equity, tolerance, ethics, discipline); the second is related to the normative life (to be aware of rights and responsibilities, fellowship, collaborative work); and the third is related with community life (democracy, community work, civic activity, patriotic symbols). Their notions are closer to a notion of active citizenship, but they do not express any clue in relation to a global notion of citizenship education, like climate change, sustainable development, internationalization, migrations, human rights, poverty, and so on.

Although in a weak way, their notions of citizenship education do include aspects related to community affairs, but do their local scope has something to do with a cultural sense of belonging to a community? Perhaps there are local circumstances that concern the community more than the global ones. During the last decade the area of Matamoros has become a dangerous place. According to the Bureau of Diplomatic Security of the US Department of State, "there are no safe areas in Matamoros due to gunfights, grenade attacks, and kidnappings. Crime and violence related to the activities of Transnational Criminal Organizations (TCOs) are continuing concerns" (OSAC, 2018). And with more detail states that:

> The primary security threat stems from the TCOs and the on-going turf war between rival factions of the Gulf Cartel and Los Zetas. Drug-related violence grew in 2017 in the Matamoros-Rio Bravo-Reynosa corridor. (...) statistics indicate an increase in the number of local nationals killed as a result of drug-related violence largely due to the chronic volatility around Reynosa. The true number of drug-related deaths, however, is difficult to obtain due to underreporting. Gun battles may occur at any time, as rival TCO gunmen engage in hit-and-run attacks and as military and federal police encounter TCO gunmen while on patrol. (OSAC, 2018)

The weight of insecurity is stronger than any global concern and, as a matter of fact this is a topic included in Delfina´s narrative when she refers that students are not going for teaching practices to the schools, because of this problem; and when she says that the Normal School has canceled community projects and activities because of the same reason. Under these circumstances, borderlands are not only conflicting places of exasperated identities; in this case are conflicting societies. Teacher's notions of global citizenship education are influenced not only by their relationship with a cultural identity, but also by the circumstances of their environment. After all, citizenship is a socio-historical learning outcome.

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The Experiences of East Asian Students Studying at English Medium Universities: A South African Case Study

Abstract

The involvement of East Asia, and in particular China, in the global markets has rapidly increased over the last few decades, and universities in English-speaking countries, including South Africa are increasingly accepting students from that region into their programmes. This requires the students to not only move to a locality where foreign languages are spoken, but also to function within a completely different cultural environment. In this case study, we consider the experiences of a group of East Asian students at one university in South Africa. In view of the interconnected world that we live in, we argue that it is important for lecturers and administrators at higher education institutions to take note of these experiences, to advance intercultural understanding and support these students towards positive international experiences.

Keywords: internationalisation of higher education, student experience, East Asian students

Introduction

We live in an interconnected world where international mobility, also in the context of higher education is increasingly popular. Burçer and Kangro (2016, p. 201) point out that a number of issues underpin the internationalisation of higher education, some of which are rooted in neo-liberalism. Economic issues, such as expanding global markets also motivate many East Asian parents to send their children to study at English medium universities, inter alia to learn English and to get exposure to other cultures, thus increasing their competiveness in the job market (Wang & Shan, 2006; Xie, 2019). Indeed, Wang and Shan (2006, p. 16) concur with this expectation and caution universities to "foster students' global understanding and development of skills for living and working more effectively in a diverse world".

Rationale and statement of the problem

International students from East Asia, however do not only have to move to localities away from family, where a foreign language is spoken, but they also need to function within completely different academic and social environments. This may pose challenges to the students in their quest for higher education, particularly if there are few peers that they can relate to. Wang and Shan (2006) point out that in Australia, there is a substantial number of Chinese international students. On the other hand, in South African universities, while it is common to find international students from Sub-Saharan Africa, the number of students from East Asia is relatively small. For instance, at the University of the Free State, during 2018, only 12 of the 39832 students (0.03%) enrolled were from East Asia (University of the

Free State, n.d.). While literature on international student experience in the United States of America, Australia and Europe are reasonably available (e.g. Marmon et al., 2018; Bertram et al., 2014), we could not find studies specifically focusing on East Asian students' experience in the Southern African context.

The first author, originally from China, experienced many problems when he embarked on his postgraduate studies in South Africa. Not only did he experience language barriers, but he often felt socially excluded (Xie, 2019). His own experience, together with the dearth in literature available specifically on East Asian students in the Southern African context, served as impetus for this study, and we pose the following research question: *What are the experiences of East Asian students during their tenure at an English medium university in South Africa*.

Methodology

We embarked on a qualitative study. The first author generated data by interviewing 6 East Asian students enrolled at a single university in South Africa, as a case study. Four were from China, one from South Korea and the other one from Japan. Four were males and two females, and four were enrolled in graduate programmes, while two were busy with their Master's degrees. We also used the first authors' own reflections to supplement the data, citing him as author.

Guided by principles of integrity, we obtained ethical clearance from the relevant ethics board, prior to the start of data generation, and used different strategies, inter alia member checking and an audit trail, to promote trustworthiness. We gave each participant a pseudonym, in the form of a random acronym (cf. Merriam, 2009).

Findings

A number of issues crystallised during the interviews. Direct quotes are provided to substantiate the claims that are made. In the section that follows, these themes are juxtaposed with findings from other studies.

Reasons for studying in South Africa

Two major reasons for studying in South Africa emerged from the data. Firstly, some students saw it as a viable option to get international experience. QQ, for instance saw South Africa as a western country with a different educational structure ("I was interested in studying educational systems of western countries"), while PP would have preferred to study elsewhere, but instead an opportunity arose to study here:

> I strongly hoped that I had a chance to study one of overseas countries such as America, Canada and some European countries. However, they were difficult to accept some foreigners to study in these fields of high-tech technology. Consequently, I made a decision to come to South Africa in terms of it was welcoming to allow foreigners to study from different countries.

Some participants indicated that they came to South Africa due to some family connection ("I came to South Africa with my parents, for my father's study in Theology" (JJ); "My relative travelled to South Africa five years ago. He told me that I should come to South Africa to study." (TT); "My relative works in a South

African company. He told me that I must come to South Africa to study" (MM). Yet, the overarching reason all the participants provided was to improve their English because a "high standard of English would help you to find a good job" (MM).

Mankowska (2018) in her study found that indeed job market prospects are a huge motivating factor for Chinese students to study abroad, not only to gain skills to improve their chances back home, but also to open up opportunities for themselves and their families to migrate to other countries.

Language barriers

Although all the participants indicated that they had English as a subject at school level and had access to dictionaries and electronic language convertors, the biggest problem for most of the participants was to communicate and study in English. QQ shared that it was a struggle "to understand some main points" in class. Not only was it difficult to keep up with the speed of lectures and discussions in class, and they struggled because of the different accents used by the people in South Africa ("A few of lecturers spoke heavily accented English or spoke English very fast thus I could not understand what they were talking about" (PP); "Different lecturers had different accents, therefore I had to spend more time on my study" (MM)). PP furthermore relates:

> *It was difficult for me to understand in the class because my mother tongue was not English. In China, I used to attend classes in Mandarin. In South Africa, I would face a new challenge – I had to study all my subjects in English. If I wanted to get involved in the class, I had to preview all my subjects before the classes and revised them after the classes.*

A study in Australia found that East Asian students often lack confidence to engage in class discussions due to their limited language proficiency (Wang & Shan, 2006). Yet, as time went by, the participants seemed to cope better, as JJ shared:

> *In the beginning, I experienced language barriers, because I was not exposed to English as much in South Korea. Once I learned how to speak English I have realized that South Africa is an interesting place to live.*

Teaching and learning approaches

A number of issues related to teaching and learning transpired. It seems that most of the East Asian students were more used to lecturer-centred environments, where students are passive, and where high levels of rote-learning was expected ("Chinese education focused on exams" (TT); "[In China] if you passed your final exams, you would pass your subjects" (PP)). Mankowska (2018, p. 154) indeed calls the Chinese schools "test-oriented" and "encyclopaedic". In South Africa, on the other hand, the approach is more student-centred and outcomes-based and this determines the types of assessments ("In South Africa, it focused on different ways to assess your study such as group assignments, presentation on-line test etc." (TT); "In South African universities, they had many ways to assess your subjects such as group assignment, presentation, class test and so on" (PP)). This seems to be a challenge for the participants. Wang and Shan (2006) argue that such assessment practices, also used in the Australian higher education environment, require students to change their way of learning.

Some of the participants found it difficult to engage with other students in class. For them, it seemed like all the South African students knew each other before entering higher education, as they could immediately mingle and form groups in class.

> *It was still another challenge for me to participate in the group discussion because most of my classmates knew each other from their high school. Thus they were easy to build up different groups in the class.* (PP)

To add, Bertram et al. (2014) warns that robust and noisy classroom discussions may cause students who grew up in the collectivistic culture of East Asia, to become anxious. Still, students shared that certain practices, such as using visual presentations helped.

> *Some lecturers preferred to use PowerPoint to explain their knowledge thus I could easily to get the main points in the class, but some of them never use PowerPoint to explain them, I was struggled to understand the knowledge.* (PP)

Perseverance of the students

What came out strongly was the dedication and perseverance of the participants in spite of the challenges above. They had high expectations of themselves, and they worked hard towards it.

> *For me, I could not find any ways to overcome language barriers thus I had to spend more time on my study. Besides, attitude was very important for every student. I did not fail any of subjects because my attendance rate was high. I finished all of my workload on time.* (PP)

JJ also shared: "I survive by having lots of 'library sessions' – meaning I spend most of my time in the library studying". Mankowska's study in Poland confirmed how Chinese students worked up to 18 hours per day, spending time in the library from early in the morning to late in the evening (Mankowska, 2018).

Social life

Some participants indicated that they managed to make friends with local people. For instance, PP shared: "Firstly, I made a lot of local friends in the class, lab and library. It was not difficult for me to make local friends. They did not force me to understand their cultures; proficiently use their language etc. because I was a foreigner". Still, others experience difficulties in this regard. TT explained: "It is difficult for me to make local friends to be close friends because we have different languages, cultures etc." and similarly YY lamented as follows: "I felt loneliness. My family is the only Japanese in Bloemfontein. I do not belong to any community. The loneliness is one of difficulty for me to stay in South Africa".

It emerged that East Asian students are sometimes uneasy with certain aspects of the South African social life including constantly hugging and touching each other. Xie (2019, p. 27) shared that on the first day in class "some ladies asked [him] to give them hugs". He indicated that he felt "very awkward and refused their request". Wang and Shan (2006, p. 10) similarly found that in Australia, Chinese students were not comfortable with "parties in pubs" where a lot of alcohol consumption occurs. Participants also admitted being intimidated by the student protests that occurred from time to time in South Africa ("Last year, I could not

attend to the classes because it broke out a serious protests in South African universities" (PP)).

Although literature suggest that foreigners often experience racism and xenophobia, and this results in verbal attacks and physical assaults (e.g. Brown & Jones, 2013), such incidents were only mentioned by two of the participants. Xie (2019, p. 25) explained that prior to entering his postgraduate qualification, he was sometimes asked "Can you open your eyes please?" or "Do you like to eat dogs or cats?". JJ shared that "There are some racial stereotypes in the beginning of the relationship, but I tell them what is right and wrong". On the other hand PP did not experience any bias:

> I lived off campus with a Chinese classmate. Most of my neighbours or classmates were university students, so I did not experience any racial discrimination in the school [sic] or in my accommodation.

Still, he was wise enough to navigate his way in discussions to prevent conflict: "I never talked about some sensitive topics with [local students], thus it was easy to make some local friends" (PP).

Clearly, to find their way in the social landscape of South Africa was not easy.

Improving the experience for East Asian students

It is not unexpected that foreign students experience language and cultural barriers when they move to a locality that is vastly different to their own, such as East Asian students migrating to South Africa. Findings in the study correspond with studies from the USA, Australia and Europe. Still, the small numbers of East Asian students on the campuses deepen these international students' feelings of isolation compared to countries more accessible and popular for East Asian people. Higher education institutions need to understand how to best support the students.

Studies shows that universities that offer successful international programmes, often offer language and communication training upfront, to better prepare international students for their studies. One such an example is the Charité – Universitätsmedizin Berlin where prior to embarking on their medical studies, international students learn to communicate in the healthcare setting. Such training not only includes learning language, but also to socialise and to communicate in the professional and academic environment in a culturally appropriate manner (Marmon et al., 2018).

International students well-being should be monitored, thus Bertram et al. (2014) recommend that information regarding stressors should regularly be disseminated to the institutional community, and that lecturers should engage with these students to raise their concerns. Briggs and Ammigan (2017) recommends a collaborative programming and outreach model that includes international coffee hours, international student essay contests, and career support which can vastly improve the student experience.

Care should be taken to inform students continuously of services, as although most higher education institutions in South Africa and elsewhere, including the one in the case study, have special units to support international and other students, what emerged from the larger study by Xie (2019) was that students were largely unaware of the availability of such service.

Conclusion

International students at higher education, have the potential to contribute to the glocal common good. Not only do they receive opportunities to gain insight and develop proficiencies necessary to function in a diverse world, international students' interaction with local students can increase the exposure of the latter to global influences.

However, Mankowska (2018) warns that this might not always be a comfortable experience for the locals. In view of the interconnected world that we live in, we argue that it is important for lecturers and administrators at higher education institutions to take note of the experiences of the East Asian students who took part in this study, to advance intercultural understanding and to support foreign students towards positive international experiences.

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The Shadow Education System in Bangladesh: A Blessing or a Curse?

Abstract

This paper defines shadow education as private supplementary tutoring that is fee-based and parallel to mainstream schooling. The study focuses specific attention on the underlying determinants of this private tutoring. This research covers the costs, patterns, intensity, and scale of private tutoring. It also provides detailed insight into the negative and positive implications of coaching, and on the impact that private education has on the educational and social lives of learners in Bangladesh. The paper also analyses the different private tutoring patterns in English, as well as the amount of tutoring offered and not offered in Bangladesh. These key points lead to determining whether the shadow education system in Bangladesh is a curse or a blessing. According to the research conducted in 5 regions in Bangladesh using qualitative method and research design questionnaire 70% support private supplementary education, 30% do not support its development and 100% of participants stated that the emergence of private tutoring was brought about by the low salary of teachers and desires of parents for the academic success of their children.

Keywords: shadow education, scale and pattern of tutoring, impact, private tutoring in
         English

Introduction

The number of students from Bangladesh attending top-ranking institutions of higher learning is on the increase yearly (Hamid, Sussex & Khan, 2009, p. 291). Many students will not sit for their examinations unless they have received intense tutoring outside the school environment (Holmes, 1981). They are coached on every subject, which means that more than one private tutor is involved.

The top schools in Dhaka, Bangladesh have strict selection policies and operate with the intention of student equality in all aspects. Schools are expected to offer the best platform for students to pursue life goals in leadership and sports (Carnoy & Levin, 1985). However, the top schools in Bangladesh should revisit their roles if they want students to depend on them as coaching centers.

Two critical policy issues arise from the education system of Bangladesh. Firstly, it appears that subjects are poorly taught in regular schools since students have to resort to private tutoring to achieve better examination performance. The question, therefore, arises as to the use of school funds. The second issue is the question as to whether the schools are providing students with the skills they need to cope with life and be able to participate as engaged citizens? (Bray, 2007, p. 67).

Research questions

1. What are the benefits of private tutoring in Bangladesh?
2. What are the repercussions of private tutoring in Bangladesh?

3. What are the main factors that lead to the spread of private tutoring in Bangladesh?

Research objectives

1. To establish the benefits of private tutoring to students, parents, teachers, and community in Bangladesh.
2. To identify the repercussions associated with private tutoring in Bangladesh.
3. To discuss the factors that lead to the spread of private tutoring in Bangladesh.

Definition of key terms

Many parameters need to be introduced to identify the nature of shadow education in Bangladesh.

- Firstly, I define supplementation. In this paper, I will focus on tutoring related to subjects that are covered in the schools.
- Secondly, the focus will be on the tutoring services that are provided by private business persons or organizations for making a profit.
- Thirdly, the paper comprehensively focuses on how subjects taught help pupils acquire advanced levels of understanding.

The research does not include artistic, musical or sporting skills learned for pleasure and personal development.

Literature review

Hazelkorn (2007, p. 15) states that decision makers and education planners around the globe have focused on promoting education across institutions, from primary to university. However, the development of a parallel system of education has continuously captured the attention of many people but has evaded policymakers and researchers. The practice has spread to developed countries as well and has had an impact on the mainstream system of education.

Nonetheless, the parallel education method has some advantages, including increasing teacher-student interaction and the income levels of teachers (Wolhuter et al., 2013). Guardians or parents have also employed private tutoring as a means of encouraging their children to focus on their future. The Indian researcher Sujata stated that since teachers are involved in coaching, they rarely attach importance to classroom teaching, but instead try to convince students to attend private coaching (Mahmud & Kenayathulla, 2018, p. 703).

Private teaching has a positive social impact; many articles note that it provides a chance for learners to establish relationships with neighbors, peer students, and students of the other gender (Manzon & Areepattamannil, 2014, p. 390). Nath shows in his 2005 research that, of Bangladeshi primary students, 28.1% boys and 33.8% girls sought the services of a private tutor (Nath, 2008, p. 55). Another study states that in Cambodia, village school students in grades one to three did not attend individual tutoring, but they sought these services in higher grade levels (Bray et al., 2016, p. 291).

Private education is understood to be more important in urban as opposed to rural settings. This is due to the higher levels of income in urban areas that cannot be

matched in country settings. Secondly, the levels of competition are more intense in urban centers due to the influence of the labor market that calls for higher quality education (Chambers, 2014).

Social, economic and educational impact

This section introduces the impact of shadow education as noted by various studies. The shadow system of Bangladesh is different from others, because of the way in which it affects the mainstream system that it tries to copy. The influence of private tutoring on the nation's economic and social development will also be explored.

Impact on academic achievement

The effects of private tutoring on academic achievement are challenging to identify because of the many factors that are in play. Malleable factors such as homework frequency, human resources, family interest and interactions between parents and teachers influence the rate of private tutoring. The need for extra instruction is regarded as the most significant malleable factor since it is essential to understand how it relates to academic achievement. The students who are benefiting from supplementary tutoring have improved and now have excellent academic performance.

Private tutoring and mainstream schooling

This section explores the impact that individual supplementary tutoring has on the dimensions of mainstream schooling. For example, if all the students in the urban centers of Dhaka have private tutoring, mainstream teachers would need to increase their efforts in the classroom (Zhan et al., 2013, p. 495). The difference in knowledge levels may cause some teachers to actively respond by helping slower learners.

For many years now since the 1990s, the mainstream education system in Bangladesh has lost its most talented mainstream teachers to the shadow system. Some teachers practice a deliberate decline in their syllabus delivery in order to create an opportunity for outside classes that are more profitable.

In Bangladesh public schools, students are expected to achieve many goals. These include developing as a well-rounded person, with the musical, sporting, and academic interests, as well as civic awareness, courtesy and national pride. In retaliation, the mainstream education system could be required to keep all students of a given grade together for the purpose of reducing the number of low achievers. By contrast, examination-oriented institutions cut the irrelevant content as a means to achieving high exam scores.

Social implications

The shadow school movement has incurred social repercussions, such as pressure placed on students, social relationships and increasing social inequalities. These will be further explored in this section.

Social relationships

The education system can affect students' positive social relationships, including family connections. If children are forced to spend most of their time on school subjects, this would keep them away from their parents for long periods and weaken the family bonds of affection. The risk of poor youth supervision may also compound critical social problems. Furthermore, some studies claim that children attend classes without proper rest or food, and they return home very late and tired. Some of them suffer from stress, depression and drop out of school. Some of them look for employment opportunities and get mistreated when they are very young. Tutoring has been viewed as a significant catalyst for racial inequalities, where mainly only rich and wealth are able to access it (Bray, 1999).

Implications for the economy

Much literature has focused on the degree of interest among people in education, which has covered mainstreams systems, and this can be expanded into private tutoring. Much empirical evidence has demonstrated that individuals having higher formal education have a greater chance of attracting higher earnings, compared to those with lower levels (Aurini, Dierkes & Davies, 2013). Education has also been viewed as an integral mechanism for economic development and this could also include tutoring.

Policy responses and options

The above discussion indicates that the government policies on education related to supplementary tutoring must start with an assessment of the context. The underpayment of teachers encourages them to provide private education as a means of gaining adequate income. In the locations where teachers are paid well, they do not need to work outside the classroom. Similarly, the setting of supplementary tutoring offered by personnel not teaching in the mainstream schools are different from those where mainstream teachers provide private instruction. In Bangladesh, the following alternative approaches have been identified as relevant to shadow education. They are explained, as follows.

Laissez-faire approach

In many nations, government planners and policymakers have established long traditions that ignore the shadow education system. This policy of non-intervention is a reflection of the laissez-faire approach. In other communities, the system is in existence by default, mainly because the personnel has been overwhelmed by pressing demands (Yang, 2015).

Supporters of the laissez-faire approach to private supplementary tutoring have put forth strong arguments for their views. One is that the markets provide self-regulation by securing the balance of prices and quality. The forces in the market can provide diversity and match consumers with producers. Another argument is that governments should stay out of the private tutoring domain due to the complexity of the arena. In many countries, the states are already involved in mainstream schooling, so the national authorities try to minimize their engagement as a means of reducing the burden on taxpayers and giving the market forces greater superiority.

Monitoring

This type of approach involves securing information on the size and impact of the shadow sector. The resulting information can be added to mainstream education planning, alongside other social services. The government also must have information on the income that tutors receive for tax collection purposes, as well as to determine the wages of mainstream teachers (Bray, 1999).

Regulation and control

This active form of government engagement covers a wide range of alternatives regarding shadow education. For instance, they may develop regulations on non-educational issues, such as adequate ventilation at tutoring sites. Additionally, more extensive rules may be needed to cover fees as well as the size of classes. These regulations would need to be backed up with sanctions and inspections. An example of this situation in Hong Kong, where specifications have been developed for organizations that provide lessons to 1-20 people; they are required to register with the education department of the government (Bray, 1999).

Encouragement

This type of alternative approach, involving active support, offers a policy based on the idea that tutoring provides tailored instruction for pupils' needs and contributes to human capital. This approach affects individuals in terms of capital and not a society's capital where it is taking place. The Singapore government gives non-profit organizations the prestige of running private tutoring, which has improved the income levels of tutors (Bray, 1999). Private education has been viewed, then, as an employment opportunity.

Prohibition

The most extreme approach to private tutoring is implementing a total ban on all commercial activities related to the practice. Examples of this approach can be seen in Mauritius, Cambodia, Republic of Korea and Myanmar; however, this ban has not been enforced in all these countries.

Methodology

This research paper utilized a qualitative methodology, where random sampling was conducted. To be specific, 5 urban-based regions were randomly chosen for qualitative analysis. 20 people were chosen from every region, where they represented teachers, parents, students, government and non-government agents to represent the whole population of Bangladesh. The questionnaire research design was used where each participant provided the benefits, effects, and ways that lead to emerging private tutoring.

Results

After the survey was conducted the following results were drawn:
- 70% of the participants agreed that private tutoring has assisted students to perform well in schools.

- 25% of the participants were against private tutoring as it leads to inequality in society.
- 5% of the participants stated that lack of good salary for teachers and parents' desires for their children to perform well in school are the main factors that lead to emergence of private tutoring in Bangladesh.

Recommendations

The strategies that may be effective towards the realization of this course are listed below. These recommendations can be considered and used by the government, policymakers, education ministries or even school heads to improve the learning process in their institutions.

- Convincing parents and students the mainstream system will give their children the necessary skills and education will reduce the need for private tutoring.
- The system of assessment should be reformed to omit the ranking of students.
- Teachers should also be encouraged to support slow learners. This task can be achieved through the involvement of professional bodies that offer guidance and training services.
- Public awareness should be created, in order to reduce the demand for excessive private tutoring.

Conclusion

This research shows the widespread nature of shadow education and its organic nature in Bangladesh. Supplementary tutoring has significant economic and social implications, as well as an effect on the mainstream education system. The key message of this paper is that shadow education needs more attention from planners, researchers, and policymakers. Private tutoring can have positive effects, ranging from increasing knowledge to providing a framework for youth's afterschool time. However, researchers need to study the nature and influence of different types of private tutoring on economic development and social inequalities. Therefore, individual tutoring is not currently an unmixed blessing in Bangladesh but in many respects a curse, its negative sides outweigh the minimal positive ones.

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Part 2

International Organizations and Education

Obed Mfum-Mensah

International Philanthropic Support for African Education: The Complex Interplay of Ideologies and Western Foreign Policy Agenda

Abstract

Beginning in the nineteenth century, a plethora of western Christian and secular philanthropies introduced "top-down" philanthropic initiatives in Sub-Saharan Africa to promote education and "development". There seems to be a complex link between the agendas of international philanthropies and their home governments' broader foreign policy frameworks. This paper discusses American philanthropies' educational initiatives in Sub-Saharan Africa (SSA) from the 1920s to the end of the twentieth century. The paper focuses on four American philanthropies namely, Phelps-Stokes Fund, Carnegie Corporation, Ford Foundation and Rockefeller Foundation. It argues that American philanthropies' education initiatives helped to push the United States foreign policy agenda of transplanting adapted education in SSA, extending the social stratification of Black Africans in the global geopolitical processes, and promoting race relations. The agenda was promoted within the framework of White racial superiority and American "idealism" which the philanthropies presented as "development" after nations in SSA attained independence.

Keywords: global education, philanthropy, colonial education, education and development, non-state actors

Introduction

Philanthropy as a concept and practice has been around since the beginning of human civilization from Abrahamic traditions, Dharmic worldviews, and other indigenous worldviews. As an act of love, philanthropy has evolved over the years to incorporate market mechanisms to guide decisions of giving (Borgmann, 2004; Edwards, 2015; Phillips & Jung, 2016). Philanthropic practices in traditional African societies were a "level" approach where both the powerful and the poor extended kindness to one another. European-American Christian and secular Philanthropies institutionalized the "top-down" philanthropic approach in Africa as a proselytizing, colonizing and imperialistic strategy (Cunningham, 2016). After World War I, American philanthropies became interested in educating Blacks in SSA (Bledsoe, 1992; Borgmann, 2004). This paper delineates the complicated ways in which American philanthropies' educational initiatives in SSA from the 1920s helped

promote American foreign policy interests in British colonial empire in SSA. It focuses on four philanthropies: Phelps-Stokes Fund, Carnegie Corporation, Ford and Rockefeller Foundations. The paper argues that the educational support of American philanthropies paved the way for the United States to promote its foreign policy agenda of transplanting adapted education in SSA, extending the social stratification of Blacks Africans in the global geopolitical processes, promoting race relations within the rubric of White racial superiority, and promoting American "idealism" in the form of "development" after nations in SSA attained independence. I use "adapted" education and "industrial" education interchangeably.

Philanthropy and "education transplanting" in Sub-Saharan Africa

Beginning in the nineteenth century, European-American philanthropic idealists saw education as a tool for social experimentation in SSA. Spurred by the "Great Awakening" of continental Europe and the abolition of slavery, the Christian missions used charitable programs in education, medical care, and food supply to promote communication, sustain interaction with the non-Christian world, and to proselytize (Pawlikova-Vilhanova, 2007). Beginning in the twentieth century the "non-state actors" saw the African American experience as a framework for philanthropy in SSA. This idea placed new themes on missionary and colonial agendas and the role Black missionaries from America should play in SSA (Engel, 2015). The pioneering works of African Methodists Episcopal Church (AME) became a paradox for White colonists and White missionaries in SSA. The AME missionaries saw it as a "providential design" to uplift Africans based on their own experience of rising from slavery to freedom (Engel, 2015). White missionaries despised AME missionaries' activities in SSA for two reasons. First, many Africans abandoned White churches for AME and these Black missionaries facilitated the rise of independent African churches. Second, the White colonists were suspicious that African American missionaries would encourage Africans to join the Pan-African movement that grew in the United States in the 1920s around the Black anticolonial actors. However, the White missionaries and colonizers liked the "industrial education" philosophy of AME missionaries because AME missionaries reached Africans with great ease. The Europeans wanted to work with AME missions to implement industrial education to improve Africans' working skills into directions that benefitted White supremacists' interests.

Debates about the ambiguous role of African American missionaries in Africa concretized in the 1920s in recommendations and resolutions that defined the place the African American experience was to have in missionary-colonial government collaborations (Engel, 2015). The first proposition in this regard was made by the Phelps-Stokes Fund, an American philanthropist organization focusing on "Negro education". In 1920 and 1924, Phelps-Stokes sponsored two commissions to survey schools in Africa to advise the British Colonial Office about where the existing education needed adjustment. The proposition was to transplant "adapted education" on the African soil. Adapted education was developed within the framework of pseudo-scientific racism and new imperialism in the mid-nineteenth century to meet the special needs and characteristics of Blacks in American south.

After World War I, Phelps-Stokes transplanted adapted education in Africa as a strategy to shape Black education policy in America and Africa to reflect the global

policy and practice, promote White American cultural norms and dominant institutions to African societies, expand American interest in SSA, and draw unexploited African regions into an expansionist American empire (Cameron, 1975; Davis, 1980). Phelps-Stokes and Carnegie Corporation established the Booker T. Washington Industrial institution in Liberia and helped implement industrial curriculum in Achimota School in Ghana, and the Jeanes teacher programs in Kenya and Southern Africa to emphasize practical aspects in education and networks of visiting teachers to rural community schools to aid local teachers. Carnegie Corporation and Phelps-Stokes facilitated education visits of African educators to St. Helena Island in South Carolina to study Black education and interracial work in the American south (Davis, 1980).

"Adapted education" and social stratification in SSA

American philanthropic support for educating Blacks was based on the ideology of "social stratification" (Hall, 1994). Before coming to SSA, Phelps-Stokes Fund supported Black education in American south within the rubric of Blacks' subordination in a stratified White American society. In the early twentieth century, Phelps-Stokes Fund President, Dr. Thomas Jesse Jones, articulated the organization's agenda to use adapted education to perpetuate the subordinated role of Blacks in Africa (Phelps-Stokes Fund, 1962). Phelps-Stokes recommended that colonial and missionary education systems replace traditional literary education with industrial and agricultural training of the Hampton-Tuskegee model, place mission schools under colonial government supervision, and that colonial government provides financial aid to support mission schools. The recommendation helped establish a system of grants to some mission schools in British colonial territories, streamline Black educational initiatives on Africa, and place the educational initiatives of African American Christian missions under direct supervision of the colonial administration (Sanderson, 1975).

Hampton-Tuskegee education was created on the ideas that: blacks needed "teachers of moral strength and mental culture"; manual labor would solve Black poverty; and Blacks remain in a state of permanent economic, political, and social subordination to the dominant White society. Richard Hunt Davis notes that industrial education was to "become a drill ground to send Black men and women rather than scholars into the world" (Davis, 1980). The Phelps-Stokes Fund pushed the Tuskegee industrial educational philosophy in Africa to ensure Blacks' perpetual position as semi-skilled and semi-literate people whose manpower would be utilized to help industrialize colonial territories in SSA. The Hampton-Tuskegee education model transplanted in SSA was to prepare and produce African leaders who would cooperate with philanthropically minded Whites.

Phelps-Stokes Commission advocated a low standard of schooling in character development, health and hygiene, agriculture and gardening, industrial skills, knowledge of home economics and wholesome recreation for the Negro masses. Adapted education was to socialize Black Africans to know their place in the emerging global society where European-Americans were in control in Africa. It would ensure that Blacks live in colonial territories in SSA without competing with Whites or demanding emancipation (Healy-Clancy, 2014). Carnegie Corporation and Rockefeller Foundation supported Phelps-Stokes' educational initiatives in

Africa within the same contexts of racist ideologies which propelled these organizations to support the Eugenics movement of the era. In 1923 John D. Rockefeller International Education Board supported Phelps-Stokes Fund to conduct a survey for the British Colonial Office of educational institutions in British territories in SSA. As a result, Phelps-Stokes Fund provided a blueprint for Carnegie Corporation's educational investment in East and Southern Africa even as the issue of community-based vocational education or university-based education was being debated on the continent (Berman, 1977; Rosenfield, 2014). Edward Berman argues that Carnegie Corporation's support for education in SSA was a way to advance American cultural transformation in British colonial Africa.

Philanthropy, education, race relations and American "idealism"

American philanthropies' educational initiatives in SSA was to engender relationships between Whites and Blacks and showcase American "idealism" in the 1950s and 1960s as British colonial territories in SSA attained independence. White Americans believed the Hampton-Tuskegee industrial education model was the key to solving the Black-White race problem (Davis, 1980). The Phelps-Stokes Commission's goal to promote education in SSA was bolstered by the events of World War I when Europe and the United States saw education of "backward" Africans as critical and promotion of "wise" educational policies in SSA essential to prevent interracial friction (Phelps-Stokes Fund, 1962). Phelps-Stokes Commission members were mostly White benevolent individuals with Kwegyir Aggrey from Ghana recruited to bolster its race composition. Phelps-Stokes Fund crisscrossed West, West Central and South Africa from 1920-1921 followed by visits to East, Central and South Africa in 1924. In South Africa, Phelps-Stokes helped shape Natal policies in bifurcating education for Blacks and Whites (Healy-Clancy, 2014). After its expeditions, Phelps-Stokes provided travel grants to persons involved in African education to visit the United States. Similarly, Carnegie Corporation supported education in Africa to promote United States' connections to the world through immigration, foreign languages, and international exchanges which enabled Americans to engage in the world (Rosenfield, 2014). Carnegie Corporation's educational support in SSA initially took center stage in South Africa after World War I with the backing of the United States government as part of the government's grand agenda to stimulate optimism after the war had weakened the meaning of progress in Europe.

From Phelps-Stokes' initial expedition in the 1920s, to the philanthropic activities of Carnegie Corporation, Rockefeller and Ford foundations in the 1930s and the post independent Africa, American philanthropies positioned themselves as carriers of American "idealism" and worked on the principle that nationalism and internationalism could be mutually reinforcing identities. The liberal idealism of the mid-twentieth century couched America's imperial interests in terms of altruism, evolution and world progress. For these philanthropies, "idealism" meant bringing other countries to American consciousness through the support and partnership with institutions, universities, libraries, and development of professional development for university staff, scientific research and useful publication in former British dominions and colonies (Effah & Senadza, 2008; Weeks, 2008).

Philanthropic support to promote American idealism was felt in South Africa in the 1930s and in countries such as Ghana and Nigeria in the 1960s. The agenda to bring South Africa more firmly into American consciousness persisted until the 1970s when the international community spoke against Apartheid in South Africa even as the United States remained silent about the political situation in South Africa. In the 1970s, Carnegie Corporation shifted its strategy in order not to be viewed as an agent of the United States foreign policy (Bell, 2000). Rockefeller Foundation helped develop the African Economic Research Consortium (AERC) which provided grants for thesis support while both Carnegie Corporation and Ford Foundation forged partnership with the Association of African Universities in Ghana, Nigeria, Kenya and other newly-independent nations to build institutional management and leadership capacities (Effah & Senadza, 2008).

In the 1950s and 1960s American philanthropies used education as an avenue to promote economic cooperation and development in the newly-independent nations in SSA. Carnegie Corporation, Rockefeller Foundation and Ford Foundation forged partnership with the newly-independent nations to support educational activities in order to promote development and modernization with the understanding that there is much rate of return to citizens attending schools in the newly-independent African nations (Parmer, 2012; Rosenfield, 2014). The philanthropic efforts to promote economic development was influenced by the goal of United States government and private organizations to provide technical assistance-couched in a form of liberal capitalism (Rosenfield, 2014). American philanthropies including Ford and Rockefeller foundations, supported higher education in newly-independent nations to promote human capacity building. American philanthropies also partnered with national educational commissions of Nigeria and Ghana to establish teacher education programs as well as institutes of education, and to provide linkage between institutes of education in African universities and universities in United States or United Kingdom. Carnegie Corporation supported the Ashby Commission of Nigeria to establish more institutes of education, and forged linkage between Institute of Education at University of Ghana and Institute of Education at the University of London and the Teachers College at Columbia University to promote faculty exchanges, teacher professionalism and curriculum reforms (Rosenfield, 2014).

In the 1960s, the Ford and Rockefeller Foundations and the United States Agency for International Development as well as other agencies also collaborated and supported higher education in many areas in SSA, which created networks of scholars, investors, philanthropists, and policy makers that became influential. The programs that American foundations supported, helped steer a middle course between the demands of African nationalists for rapid progress and the elitism of British colonialists in creating an African elite in their own image that were mostly pro-American/Western but contributed little to national development or to interrogation of the existing social inequalities in the societies (Parmar, 2012). Parmar argues that colonial authorities fostered development of native elites for functional purposes to aid colonial rule. Therefore, the tiny minority of educated Africans was great for the colonial administration. It was this western-oriented elites that the American foundations worked further to nurture and develop.

Conclusion

Since the 1920s American philanthropies implemented "top-down" approach to philanthropy to promote education policies that served the interests and charted American foreign policy agenda in SSA. The strategy was part of the western agenda to subordinate Black Africans. However, Black Africans were not passive recipients of western philanthropic influence as we witnessed in the vehement resistance of adapted education in Ghana, Kenya, and Nigeria (Mfum-Mensah, 2017). While Black Africans were to be subordinated to the whims and caprices of the higher strategic goals of American and Western powers, as was the common belief of American philanthropies from the 1920s, the reaction of the Africans toward the education model transplanted in Africa showed that colonized and subjugated people set their own agenda overtime and become active agents to resist outside forces. It is clear that during the century of European-American philanthropic initiatives for education in SSA, Black Africans worked to reshape the intentions and forms of an imposed education model.

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Changing Landscapes and Shifting Perspectives in a Glocalised Learning Environment

Abstract

People's enamoured preoccupation with *change* is as old as civilisation itself. Making changes for a multitude of various reasons has been an on-going process for centuries. This paper explores changing landscapes and shifting perspectives in a glocalised learning environment. It looks at how societal changes, brought about predominantly by the inescapable forces of globalisation and its yield, have inspired shifting didactic perspectives and related transformations across societal, and by extension, teaching and learning landscapes. A literature-based approached, which is a qualitative technique, is the methodology chosen for the paper. A demerit of this approach is its dependence on other published work. The reliance here is not total because personal experiences are used as supporting evidence for the discussion. An analysis of the literature reviewed reveals that changes in a globalised world are unavoidable. The paper therefore asserts that the changes made should focus on benefitting entire societies because of the implications there are for sustainable education, sustainability and national development.

Keywords: glocalisation, globalisation, change, global 'scapes', educational landscapes

> *The world as we have created it is a process of our thinking. It cannot be changed without changing our thinking.* Albert Einstein

Introduction

The essence of the title *Changing Landscapes and Shifting Perspectives in a Glocalised Learning Environment* has impelled me to begin this paper with one of my favourite Latin expressions: *tempora mutantur, et nos mutamur in illis* – times change and we change with them. This expression finds resonance in the multiplicity of changes that have taken place in the teaching and learning environment over the centuries. Obviously, no single address possesses the capacity to fully explore issues as all-encompassing and wide-ranging as those linked to shifting perspectives and changes across educational landscapes since the beginning of civilisation. Considering that glocalisation is central to the discussion, and recognising that glocalisation was introduced in the latter half of the 1980s to make clear that globalisation does not only involve "cultural homogenisation" but also has "heterogenising aspects" (Robertson, 2012, p. 191), the main discussion confines itself to post-1980 occurrences, with earlier references as supporting evidence.

The word *change* and all its derivatives are probable the most uttered words in discourses and everyday exchanges around the world. Societal changes in post-war twentieth century have continued to recast themselves in post-modernistic scenes on a global scale. During the first decade of the twenty first century, some of those very changes have been changed and/or expanded to accommodate the rapid

advancement in technology. The tentacular arms of globalisation have grasped nations in such an ambiguous manner, forcibly and open, yet voluntarily and covert, that I dare myself to think in terms of a *post* post-modernism.

The paper attempts to explore the globalised situations that are largely responsible for the numerous and varied changes that have caused perspectives to shift in glocalised learning environments. It contends that the upshot of globalisation is the root cause of the changing educational landscapes. To support the discussion it relies on authors and researchers' understandings and insights of change, changing landscapes, globalisation, and glocalisation. The methodology used is a literature-based approach. This approach makes allowance for the identification of "the essential attribute of materials" (Lin, 2009, p. 179), as well as for the reviewing of "previous research findings to gain a broad understanding of the field" (Travis, 2016).

Conceptualising the concepts

Change, landscapes, globalisation and glocalisation are the main theoretical concepts that provide an appropriate backdrop for the discussion.

Change

An online Oxford Dictionary defines change, when used as a verb, as: *make or become different*; as a noun it means: *an act or process through which something becomes different*. These simple, but powerful definitions set the right tone for all situations of change. However, in the teaching learning environment and in education circles, the synonymous renderings for change have firmer and expanded applications. This section draws attention to three examples – reform, redesigning and transformation.

Example one is curriculum *reform*. This is about improving the quality of teacher professionalism, education and it outcomes (McCulloch, 2005; Hopmann, 2003). The widely held perception is that school curriculum reform is "a key instrument of educational change" (Qoyyimah, 2018, p. 571). But alongside curriculum *reform* travels policy *reform*, not least for the mismatch between policy and classroom practice and policy and social reality (Alexander, 2014; Tsushima, 2011). Another example is seen in the National Institute of Education's (NIE) *Redesigning* Pedagogy biennial conferences. In the welcome remarks for the 2017 conference, the conference convenors recognise that we are living in an era of connectivity and "societal and global *transformations* that are unfolding at an unprecedented pace" (Hung, Kit & Poon, 2017). There is a consensus among educators that in light of these very global *transformations*, it is imperative for education systems to change how they operate (Watanabe-Crockett, 2018).

Landscapes

Education is the qualifier for landscape in this paper. In the context of change, educational landscape here symbolises the entire education system. But there are specific references made to literal aspects of the system, for example the HE landscape. So while landscapes may be used representationally for certain areas of education such wealth and stability, knowledge and institutional diversification

(Meek, Teichler & Kearney, 2009), it also has a non-symbolic link to on-going research and related activities (Terepyshchyi, 2018, p. 375). The following are shown to be the research focus of educational landscapes: (1) Scale (global, regional, national); (2) Content (pre-modern, classical modern, futuristic); (3) Management style (democratic, authoritarian, liberal); and (4) Economic model (state, market, mixed) (pp. 376-377). A study of these landscapes helps education authorities to determine future trends. But what does education landscape mean?

Globalisation

This concept has attracted debates from a range of various angles – from questioning its historical beginning (O'Rourke & Williamson, 2012), to who actually benefit from its processes (Gurria, 2007), right through to the social impact it has on developing countries (Lee & Vivarelli, 2006). Although these aspects are related to the discussion in one way or another, I wish to make mention of Maringe, Foskett and Woodfield's conceptualisation because of its direct link to change. They see globalisation as: "a term describing world-scale transformations taking place in the political and ideological, the technical and economic, and the social and cultural aspects of life" (2013, p. 12).

Glocalisation

Glocalisation possesses a ubiquitous nature. It pervades every aspect of national and international spaces – socially, economically, politically and even academically. Yet, this concept has been under-theorised in the literature (Roudometof, 2016, p. 1). Although Roudometof acknowledges that the word *glocalisation* was coined from a fusion of global and local, he asserts that as a concept, it should be "analytically distinct from globalisation". It is therefore instructive that Roudometof utilises "a variety of real-life experiences and situations" to explain glocalisation (ibid). Using a more direct political and economic perspective from the angle of scaling and rescaling, Swyngedouw (2004, p. 38) sees glocalisation as being shaped by global forces: "the 'forces of globalisation' and the 'demands of global competitiveness' prove powerful vehicles for the economic elites to shape local conditions…". These very forces have been influencing local governance and decisions.

From the preceding paragraph, it is clear that glocalisation is a very complex concept, which can be explained from a variety of perspectives. When Shaw (2011) titled her Financial Post article 'Globalisation Rules the World', her thoughts were not misplaced. Linking glocalisation to hypertargeted marketing shows how very involved and widespread a concept it is, since marketing is a concern of every nation. Besides, it is directly linked to globalisation, which has many challenges and is itself a more contentious notion (Oseyomon & Ojeaga, 2010; Lee & Vivarelli, 2006). In reviewing Roudometof's *Glocalization: A Critical Introduction*, Gobo (2016) opines: it is necessary "to add glocalisation to the social-scientific vocabulary, as an analytically autonomous concept, and not as a mere appendage to globalisation, cosmopolitanisation, or theories of global diffusion". Taking this position will undoubtedly provide authors and researchers with opportunities to examine glocalisation in its entirety with a view to filling the literature gaps concerning its conceptualisation.

Education landscapes

Education landscape: Knowledge

Education research, as a machine of knowledge production, "has been produced by researchers from the global North" (Thomas, 2018, p. 282). And even when there are collaborative efforts with researchers from the global South, the knowledge production process, including the research design, is maintained and controlled by researchers and associations from the global North (Jeffery, 2014; Maclure, 2006). The terms global North represent "economically developed" and global South denote "economically backward" societies (Odeh, 2010). Conceptually, these are complex terms. However, Odeh's explanation seems the most appropriate for the discussion.

On knowledge ownership, global South researchers start with an economical advantage, but even more telling are the ingrained psychological rumblings that remain after years of colonial rule by particular countries in the global North. Consider for example, the dependent, yet dialectic relationship between the United Kingdom and its Overseas Territories (OTs). Knowledge ownership in the global South remains an illusion for collaboration, because even when challenges are addressed, positive outcomes still favour the global North (Jeffery, 2014; Maclure, 2006). Past experiences coupled with informal conversations with colleagues currently working in Montserrat, evidence this. Educators in the system are not 'fully' research active, from a knowledge production perspective. In fact, research activities remain in the realms of the University of the West Indies (UWI), and less obvious, other regional and international universities. There seems to be no general appetite for research work that demonstrates knowledge production or ownership in local contexts. The dominance of global North literature plus the 'greener pasture' ideology carry an advantageous position over the local knowledge.

Education landscape: HE

Calderon's 2018 paper supports the argument that HE is changing rapidly. Calderon employs United Nations Educational Scientific and Cultural Organisation (UNESCO) Institute for Statistics to compare student enrolment and shifting HE landscapes. Student enrolment tripled between 1970 and 2000, while global enrolments decrease because of low fertility rates and a declining youth population (Gallagher, 2018). Still, Calderon predicts a 281% increase between 2000 and 2030.

Enrolment necessitates scholarship and cultural exchanges between global North and South universities (Jibeen & Khan, 2015; Edmonds, 2012).

Education landscape: Learning

The Association of American Colleges and Universities (AACU) (2007) rationalises: "The world is being dramatically reshaped by scientific and technological innovations, global interdependence, cross-cultural encounters, and changes in the balance of economic and political power…", where lives are shaped within disruption and interdependence rather than certainty and insularity. AACU's explanation places globalisation in a menacing and hostile environment that appears to frustrate learning processes and outcomes. Given the interlocking relationship between globalisation and glocalisation, it is not farfetched to conclude that learning

in a glocalised environment is equally intimidating. Ironically, these same intimidating environments inspire changes in behaviour that facilitate learning (De Houwer, Barnes-Holmes & Moors, 2013).

Education landscape: Leadership

Leadership and its related theories have earned their places in the changing landscape debates. Leaders are at the helm of educational reform and have often been persuasive in getting "followers to adopt certain behaviours in order to bring about what the leaders regard as beneficial change" (Bush, 2018, p. 883).

Transformational leadership is considered to be a very popular leadership style in education and educational administration (Berkovich, 2018; Bush, 2018). I refer to two time periods to link transformational leadership to the glocal discussion: (1) the Western period – 1990 to mid-2000s; and (2) the global period – mid-2000 to present (Berkovich, 2018, p. 891). Leithwood and Jantzi (2005) explain that during the first period, transformational leadership was a subject of research mainly in Western countries. It was not until the second period that interest in non-Western countries began to grow. Analogously, change processes in a New Zealand university, were done in three phases: (1) changing the governance structure, 1985 to early 1990s; (2) consolidation in the early 1990s to early 2000; and (3) changing tack in the early 2000s to 2010 (Chong, Geare & Willett, 2018, pp. 932-936). The research focuses on issues of managerialism and collegiality. Bush describes managerialism as managerial leadership practised to excess (2018, p. 883). Interestingly, at the New Zealand university, the three phases of change overlap the two time periods when Western and non-Western countries began to give attention to transformational leadership research.

Utilising a cross-cultural comparative lens in sixteen countries across five continents, Miller (2018, p. 2) emphasises that school leadership is experienced in a dynamic educational environment that require leaders to lead change. Miller also notes that internally motivated leaders do not rely on policy to take action when required. The example of how transformational leadership took on a role of its own in education in emergency situations during the height of the volcanic crisis in Montserrat, does reiterate Miller's emphasis. Effective leadership is also shown to be advantageous to sustainable education and development (Shotte, 2013, pp. 34-37).

Clearly, leadership of whatever kind runs alongside changing landscapes and it is bolstered by shifting perspectives of policy makers and other involved individuals. The complexity of leadership is revealed in global as well as local contexts via shifting technological, cultural, socio-economic and socio-political factors.

Education landscape: Digital trends

Technological innovations are used on a daily basis in just about every country in the world. Such remarkable frequency and astonishing spread prompt questions about what is driving technology's widespread pace. Aslam et al. (2018) provides an answer based on findings of their research work. Three of the six questions that guided their investigations are: (1) How has the technological innovation landscape evolved? (2) How strong is the diffusion of knowledge across countries? and (3) Has

knowledge become more globalized? Their findings reveal: "the spread of knowledge and technology across borders has intensified because of globalization".

The constant upgrading of new software and continuous announcement of new gadgets have become common occurrences in the almost every country in the world. These are the digital trends that are embedded in developed as well as developing societies. This implies that even in communities that have strong traditions, technologies are helping people to acclimatise to the changing landscapes in glocalised environments. Such a situation seems desirable although in some cases "digital parenting skills have not always kept pace" with the rapid changes in technology (Parmar, 2017). Teachers too in developed and developing countries need to keep up with the pace of the ever-changing advancements in technological advances. Education officials in Australia are recommending "regular, scaffolded and sustainable" professional development (Hyndman, 2018).

Undoubtedly, the exponentially-growing digital landscape provides numerous possibilities for everyone to engage in digital activities (Howell & O'Donnell, 2017). Still, the digital divide is likely to grow (Thomas, Wilson & Park, 2018), not just in an Australian context, but on a global scale. Nevertheless, the evidence shows that the digital landscape will continue to change in a glocalised environment.

Conclusion and insights

The paper focuses on changing landscapes in a glocalised learning environment. Using a literature-based approach, it sees the various shifts in perspectives and resulting changes as being caused by globalisation. Care was taken to interpret the landscapes within an educational context. Change, changing landscapes, globalisation and glocalisation are the main theories explored. Personal experiences lend some support to the discussion.

Globally, there is a general recognition that effective school leadership has the potential to change the lives of learners as much as it does to transform entire communities. Transformational leadership and related educational procedures are deemed as meaningful activities, when positive results spread to the wider national community.

Generally, Western/European models of education have neglected taking into account the value of indigenous knowledge and the epistemologies and ontologies that have shaped the lived experiences of indigenous cultures and traditions. Orally transmitted intergenerational knowledge is not recognised as having intellectual weight and therefore not counted as knowledge to be exchanged or transferred. Yet, the very substance of indigenous knowledge can contribute meaningfully to the sustainable development debate and by extension the national development of the countries concerned.

Change speaks to an audience as extensive as where there is human existence. This suggests that change in a glocalised world is inevitable. Notwithstanding the global pressures that hold nations in their grip, as far as possible, nations should take care to ensure that the changes made are realistic ones that not only bring benefits to their subjects' individual advancement, but also to a national agenda that builds and support sustainable development. I close this discussion with my very own quotation of hope: *I hope that the time will come when we embrace changing landscapes in a borderless, non-nationalistic environment where the entry visa is agape.*

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Part 3

School Education: Policies, Innovations, Practices & Entrepreneurship

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Free Schools: The Way forward or a Mistake in the Provision of School Places and Educational Innovation in England

Abstract

This paper discusses the rise and possible fall of the Free Schools movement in England. The arguments here are taken from a collection of government reports, education charitable trust's papers, press reports and articles written by champions of the Free School movement. It does appear from examining the presented evidence, that the initial idea of the involvement of parents and teachers in establishing these schools has not been a success, due to the time and bureaucracy involved in founding such schools, to meet the required criteria. Often, rather than providing needed school places in areas of shortage, many such schools have been established in areas where there is a glut of school places. It appears that the underlying belief that this movement would empower and liberate teachers away from the restrictive national curriculum has not succeeded. However, despite ongoing problems with Free Schools, there are some who believe they are a real alternative to the structured and controlled state schools following the dictates of the national curriculum. At present it is impossible to say if the venture has been a success or not, but there are certainly serious concerns over some of the schools which have been established; those that have failed and those that do not really intend to serve the need for parental choice. In addition, the costs of this venture, when finances for schools have been severely curtailed in England in the last few years, raises the question as to whether this initiative is providing value for money.

Keywords: free schools, innovation in teaching, school place provision, education policy

Introduction

The idea of introducing Free Schools (FS) in the English education system arose in 2010, at the behest of the then Secretary of State for Education, Michael Gove. They were a copy of the movement started in countries such as the USA and Canada, and where they were known as Charter Schools in the1960s/70s and were introduced to give parents more choice in the education of their children. These schools were also modelled on the Swedish experiment and intended to be outside of the control of Local Education Authorities (LEAs) so could be based on the academy philosophy, or founded by parents or teachers who wanted more control

over the choice of curriculum and the way it was taught. Studio schools and university technical colleges are part of the movement and these schools are free to attend for students. FS, like the academy movement, are governed by non-profit making charitable trusts. The initial idea was that by competing with LEA run schools they would drive up standards and increase the number of schools places available (Inge, 2018). FS are operated by charities, independent schools, universities, community and faith groups, sports clubs, business and international companies, such as Sky. Since their introduction in 2010, the number of FS has increased, more than 400 being approved by the coalition government (2010-2015). However, of late closures have occurred, due to a variety of reasons, for example failure of Ofsted inspections, inability to find a suitable space and buildings to house the schools, lack of parents choosing the schools, or inability to raise sufficient funds and the time it takes to complete the complicated paper work. Many schools have failed and there has been, in the opinion of the National Education Union, a massive waste of tax-payers' money, when schools are being severely restricted with funds (Weale, 2018). Seven years on the flagship policy has, by many critics been deemed a failure and a called a gross waste of money (Inge, 2018).

What is a Free School?

FS are non-profit making, independent but state funded schools, which are allowed to re-write the national curriculum; though the curriculum delivered must be, as for the national curriculum broad and balanced. They are also, like Academies, introduced by the Blair government in 2000 (Politics.Co.UK, 2004-2019) allowed to set their own terms and conditions for employing staff; including remuneration and were not obliged to use trained and qualified teachers. Both of these last conditions were not well received by unions and many parents. The difference between a FS and Academies is that FS are generally new schools, whereas Academies are usually formed from failing LEA run schools, which are forced to become academies and generally join an Academy chain of several schools, in an area of the country. Gov.UK (2018) reported that in September of 2018, 53 new FS and one university technical college would open, creating up to another 40,000 school places across the country. Many of these however, have been set up by multi-academy trusts (MATs) rather than by parents and teachers, though in some places they are combinations of a charity and a university sometimes with a MAT. One example of this is Saracens Rugby Club in London, which with Middlesex University opened a Free School to boost education through sport. Some have religious affiliations, or are established to serve a particular need in a local area, such as special education, or technical or arts, or subject based education.

> Education Secretary Damian Hinds said – I want to create new, great schools where they are needed most and give parents greater choice when looking at the schools that are right for their children. (Gov.UK, 2018)

FS according to New Schools Network (no date) are funded all, or in part by the Education and Skills Funding Agency (ESFA) part of the Department for Education (DfE). The amount they receive per pupil depends on the LEA in which they are situated and they also receive the pupil premium (additional funding) for those pupils who receive free school meals, children of forces personnel and those in care

of the LEA, as they are judged to come from deprived backgrounds. However, other factors come in to place, such as the numbers of students, student retention figures, provision of high-cost subjects and costs specific to an area. Additional funding is supplied for high needs students, by bursaries and financial support for individuals.

The original purpose of the Free School movement was to introduce innovation in who provided schools, how they were run and the curricula offered with teachers and parents being at the heart of the planning and allowing autonomy and encouraging a self-improving system (Montacute, 2018). The initiative followed on from the former government's idea of introducing autonomous Academy schools, where there would be less control over curricula and teacher qualifications. The idea was to allow those establishing a school to have the freedom to shape the school from its initial conception until it was an up and running entity. The idea was that this would boost quality, as schools would be more autonomous and this would increase competition and rivalry between schools (Garry et al., 2018).

Has the Free School movement met with success?

This question has been hotly debated by protagonists from opposing views of the initiative. There are those who are involved in FS projects are totally committed to this movement, including The New Schools Network, who are the charity receiving government funding to support Free Schools. Counter arguments however, have been presented by other bodies such as Ofsted, who have closed several FS and the NFER, Sutton Trust and National Audit Office, who have questioned the financial costs to the education budget of this venture.

Criticisms of the Free Schools programme

Critics of the initiatives have included, teachers, unions and the National Audit Office (2017) whose Report *Capital Funding for Schools* found that 57,500 of 113,500 new places in mainstream free schools opening between 2015 and 2021 would be likely to cause spare places in the immediate areas of some of the institutions. Of the FS which opened in 2015, the report considered that 52 could have a moderate, or even high impact on government funding of some 282 neighbouring schools and the report claimed that the venture had produced billion pound bills, related to setting up and procuring buildings, whilst existing schools fell into disrepair. In addition, 150 million had been spent on schools that had failed to open or been quickly closed (Inge, 2018). The Labour Party at its 2018 annual conference, committed to axing the FS programme, which was deemed to be inefficient and a waste of money (Cowburn, 2018). Problematic too have been the traumas caused by FS that have opened and quickly closed for a variety of reasons, including several studio schools linked to sport or technology. Limited curricula, poor discipline and failure to properly prepare students for national exams were some of the reasons for rapid school closures (Lock, 2018; Mintz, 2018). Another problem with these studio schools for students aged 14-19, was that specialisation at the age of 14 had not proved popular with students.

Further criticisms have come with regard to the difficult path to founding FS, including a two pathway approach (Bowen-Viner, 2017). These involve a central route, where applications are made to central government for funding and

permission to open a school and the presumption route where LEAs are responsible for finding the funding, so as to provide much needed extra school places. However, at present LEAs do not have the finances to do this. Bowen-Viner (2017) also criticises moves towards opening FS specialising in maths, as this would require selection of more able pupils something not in the original FS ethos. Instead she recommends combining the two strands of central and presumptive. This would only allow central government funding if there was a proven lack of school places in the area and for LEAs where this did not exist, a more competitive process could be used with potential groups bidding to open a FS in the area. This author does praise the opening of FS for special needs students, but strongly points out that FS are about providing much needed school places and are not the vehicles of innovation and improvement suggested in their initial launch.

One of the main ideas underpinning the FS movement was the idea of parental and community involvement, but it appears parental involvement in both FS and MATs is declining. In 2016 the involvement of parent governors was restricted by the government as a publicised White Paper suggested their role was no longer essential. Later there appeared to be a change of heart and the Education Select Committee in Parliament were assured by the then Secretary of State for Education, that the role of the parent governor was vital (Roberts, 2018a). In addition this author points to the concerns of the National Governance Association, over the lack of FS being set up by parents, as MATs seem to have taken over. The Association had predicted this problem when FS were proposed, as they believed that starting a school is a massive enterprise and far too time consuming and complicated for most parents.

Reports from parents who have succeeded show that in reality, to establish a school is a massive undertaking for parents, who are unable to concentrate on anything else. The complicated paper work involved and the difficult job of finding premises, coupled with the struggle to achieve success in Ofsted inspections, is well documented by parents and teachers involved in the task of setting up a FS and that for most people, in reality, the task is not possible as work and family life have to be set aside (Roberts, 2018b). Toby Young a successful FS creator, in the same article is quoted as saying that government attitudes have changed from the initial ideas, as it there was now a perception that allowing parents, teachers and communities with no experiences to set up schools was a risky exercise. Roberts (2018b, p. 12) points to the fact that 'although 61 are up and running in England only 4 parent or community-led schools were set up in 2016-17 and none at all have been set up this academic year'.

One strong critic of the FS programme has been the founder of the Teach First initiative in England, Brett Wigdortz. In a speech in Dubai, he claimed that the programme was too oriented towards London and was causing a concentration of talent which needed to be more widely spread. He particularly raised the problem of schools in coastal towns, which in many cases struggle to recruit innovative teachers, as new ideas were being concentrated in the capital and in the FS and Academy movements (Pells, 2107). Doug Lemov, the American teacher trainer, working with the staff of a new FS to be opened in Folkestone on the Kent coast, agrees that schools in coastal towns in England have particular problems and he highlights the lack of parental ambition in such areas, with a mainly white working

class population and their lack of clear understanding of the need for a good education, as the towns are deprived areas, lacking employment prospects, which results in a lack of pressure to be well educated (Hazell, 2018).

The NFER/Sutton Trust report on Free Schools (Garry et al., 2018) pointed to many problems with the FS initiative including that of a lack of innovation in curricula or teaching, which was part of the original aim of the initiative; nor are they mainly parent-led. In addition students from disadvantaged backgrounds are less likely to attend FS than other students in their area, but if they do achieve better results than those in mainstream schools. In addition the report underlined the fact that parental involvement in setting up the schools decreased massively from the first schools opened in 2011. Over half of the free schools opened have in fact been introduced by MATs, with the proportion of these growing all the time. The lack of innovation was also underlined.

> *... only one-third of established free schools have demonstrated a novel approach. Of the 152 open primary free schools in England, 35 per cent were found to be innovative, compared with just 29 per cent of the 113 open secondary free schools.* (Roberts, 2018c)

As far as the report was concerned the initiative was not fulfilling its original purpose. In addition a further report from Education Policy Institute criticised the initiative as being ineffective in targeting areas of low school quality and FS pupils are more likely to have English as an additional language, than those in main stream schools (Andrews & Johnes, 2017). However, the report concludes that it is too early to make judgements on pupil performance or schools' excellence in comparison with mainstream schools as yet.

Positive reports on Free Schools

In December 2018 Malnick in the *Daily Telegraph*, reported that the DfE had released figures from Ofsted in relation to behaviour standards in schools. It appeared that 39% of Academies and FS had been rated outstanding for behaviour in Ofsted reports, compared with LEA schools at 31%, though at present only a few FS in relation to others have been assessed. In addition, Lehain (2018) claimed that FS were more likely to rated outstanding by Ofsted than other state schools and GCSE results had, for FS been at the top of the tables. In addition at key stage 1-5 FS had excellent success rates. Earlier it was demonstrated that provision of new school places was being achieved in some areas of need (Evans, 2018). In addition it appears competition between schools had made state schools look at their results and change their approaches to teaching.

Toby Young a strong advocate of FS, who has led one successful secondary FS in London and opened a new primary school in a different borough before moving to the New Schools Network, in a blog in *The Guardian* argued that as suggested by the original intent for FS, they are the perfect place to introduce new approaches and could serve as a research base to test out educational practice. His approach is based on classical liberal education philosophy with the importance of knowledge, essential in the development of higher order thinking skills, at its heart, as opposed to the skills development agenda now popular in education (Young, 2018).

Conclusion

As can be seen from the above the final conclusions on the effectiveness of the FS movement has yet to be fully assessed and dissected. However, despite some strong advocacy from passionate believers in the policy and records of successful outcomes for some children, it appears that the original purpose of the policy has been lost to a great extent, as it was over ambitious in attempting to involve parents and teachers in the mammoth task of establishing schools. The report by NFER/Sutton Trust (Garry et al., 2018) must be taken into account, as it points to numerous failings and the take-over of the so-called Free establishments to a great extent by Academy chains, negating the idea of community autonomy and innovation being at the heart of the policy. Maybe the idea to remove schools from the straight-jackets of ever increasing government control and regulation was in the first instance, a good idea, but appears to most eyes to have been naïve and simplistic in its assumptions. It will take time for final judgements to be made and certainly many highly dedicated people have attempted to rise to the challenge made in 2010, but it does appear that in hindsight, as an idea which was over ambitious; putting people with limited experience in charge of such a massive task. Finally the costs have far outstripped expectations.

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Understanding Teacher-targeted Bullying: Commenters' Views

Abstract

This paper reports on findings from a qualitative content analysis of Internet commenters' postings on teacher-targeted bullying (TTB). Postings on the website *The Educator's Room* were used as data. The study found that the commenters perceive TTB to be a serious and escalating problem characterised by an imbalance of power and an intention to do harm, and consider it repetitive and enduring in nature. The study furthermore found that the commenters view TTB as the physical and verbal abuse of teachers by their learners. This study has shown that, despite ethical dilemmas, social media can be a rich data source when investigating TTB. It is concluded that individual teachers' postings about their public and private humiliation and pain are globalised and made accessible to researchers and laypersons alike through use of a medium that transcends borders.

Keywords: commenters, definition, educator-targeted bullying, postings, social media, teacher-targeted bullying

Introduction

Advances in technology allow easy access to the Internet in most parts of the world, which led to the number of social media users growing considerably worldwide. Social media are 'online, often mobile, platforms that support the creation and exchange of user-generated content' (Taylor & Pagliari, 2018, p. 2). Social media include, but are not limited to, broad platforms for networking and sharing that act as the curator of content, such as Facebook, YouTube, Twitter and LinkedIn, and online forums aimed at specific communities (Taylor & Pagliari, 2018).

The posting of videos of school violence in general and teacher-targeted bullying (TTB) specifically created awareness of this scourge and resulted in public outcry (Jordaan, 2018). Postings on social media of learners abusing their teachers may, however, move beyond the sensational and create a broad platform for networking among victimised teachers and sharing information on the phenomenon. One such platform is *The Educator's Room*, which aims to empower 'teachers as the experts in education'. On 6 May 2013, Sarah Sorge posted an article, 'The bullied teacher', on *The Educator's Room*. Sorge (2013) invited the readers of her post to share their experiences and suggest possible solutions to the problem. Over a period of five years (6 May 2013 – 23 May 2018) 66 readers posted comments in response to Sorge's article and/or responded to fellow commenters' comments. A commenter is a person 'who expresses an opinion or engages in discussion of an issue or an event, especially online in response to an article or blog post' (English Oxford Living Dictionaries, n.d.). Only five of the commenters who took part in the Internet conversation were not victims of TTB.

The richness and forthrightness of the commenters' postings motivated me to utilise their comments as research data to get a better understanding of TTB. This paper aims to answer the following questions: (1) Is TTB a widespread, escalating occurrence? (2) What understanding do the commenters who took part in the Internet conversation have of TTB? In this paper, I will furthermore suggest that the postings of the individual teachers are globalised through the use of a medium that transcends borders, and that social media postings may be used as a data source for researchers.

What is TTB?

Definitions of bullying usually include the following three criteria: (1) aggressive behaviour directed at another person with the aim to hurt or cause harm; (2) repetitive, enduring negative behaviour; and (3) a power imbalance between the victim and the bully, which may result in the victim not being able to defend him- or herself (cf. Kauppi & Pörhölä, 2012, p. 1061). The third criteria may be problematic when defining TTB, because teachers are supposed to have 'power' over their learners. Taking these criteria and dilemmas into consideration, Kauppi and Pörhölä (2012, p. 1061) define TTB as:

... a communication process in which a teacher is repeatedly subjected, by one or more students, to interaction that he or she perceives as insulting, upsetting or intimidating. Bullying can be verbal, non-verbal or physical in nature.

Sorge's (2013, p. 2) definition of bullying reads as follows:

Bullying is the use of superior strength and influence in order to influence and/or intimidate others in order to reach the desired outcome.

The latter definition acknowledges the imbalance of power between the victim and the perpetrator, as well as the intentionality of the negative acts. Sorge's (2013) definition is, however, silent about the repetitive nature of the negative act(s).

These two definitions as well as the stated criteria will act as a framework for my description of the commenters' understanding of TTB.

Research methodology

A qualitative, exploratory and descriptive research design was employed to gain insight into commenters' understanding of TTB.

An increasing quantity of material that is for the most part 'public, permanent and searchable' is published by millions of social media users worldwide (Giglietto, Rossi & Bennato, 2012, p. 145). However, the use of social media as a data source is a rather new trend. An extensive study by Taylor and Pagliari (2018, p. 2) highlights the numerous uses of social media in research, such as assessing commenters' 'responses and sentiments towards particular topics'. Farnan (2014, p. 62) moreover found that data from social media platforms has been successfully used to describe public health issues and has demonstrated a high level of correlation with other forms of public health surveillance.

During August 2018, I did several Internet searches on TTB, using phrases such as: 'teachers being bullied', 'bullied teachers', 'teachers being bullied by pupils' and 'teacher-targeted bullying'. I also used synonyms such as 'educator', 'learner' and

'student'. My search resulted in the identification of numerous academic studies and newspaper articles available on the Internet, as well as comments on social media websites. Even though I read scores of the identified comments on the topic on social media, I cannot claim that I worked through the entirety of social media before identifying comments on the article by Sorge (2013) available on *The Educator's Room* as my data source. The sheer size of the World Wide Web makes such an undertaking impossible and improbable.

My decision to use data emanating from a social platform to gain insight into the phenomenon resulted in an ethical conundrum. *The Educator's Room* is not password or paywall restricted; any Internet user has access to the website. Comments by victims of TTB have thus been placed in the public domain. Even though the commenters were requested by Sorge (2013) to post their comments anonymously, it is difficult to ascertain whether or not all commenters used pseudonyms. Some posts are placed under what may be the commenter's own name or name and surname (e.g. Mary, Doreen, Pam Jacobson, Diana S. Rice) while other commenters obviously used pseudonyms (e.g. JAD, 'Bullied by mean girls'). In this paper, I will use the names, surnames and/or pseudonyms of the commenters as it appears on the website. Taylor and Pagliari (2018, p. 3) rightly argue that one of the greatest challenges for researchers utilising social media as a database is the 'unclear boundaries between "public" and "private" spaces'. They furthermore note that 'consent to the use of social media data in research is rarely obtained through informed choice but rather assumed on the basis that users have chosen to place it in the public domain'. I tried to engage with the commenters' postings in a respectful manner, and did not trivialise their humiliating experiences and pain.

Henning's (2005) guiding principles for qualitative content analysis were followed to reduce, condense and group the content of the postings on the website. To improve the trustworthiness of my findings, I tried to facilitate transferability by providing thick descriptions that may 'enable judgements about how well the research context fits other contexts' (Li, 2004, p. 305) and juxtaposed findings from the current study with those of other studies on TTB (Shenton, 2004). Readers of this paper can freely access the data on which this paper is based (https://theeducatorsroom.com/the-bullied-teacher/). Readers will thus be able to critique my findings. The absence of specific criteria to guide my decision to utilise comments from *The Educator's Room* (and not another website) as research data may lessen the integrity of this study.

Findings

The prevalence of TTB

While researchers (De Wet & Jacobs, 2018; Woudstra et al., 2018) found that TTB is a worldwide phenomenon that has been researched since the 1970s, some of the commenters on the website seem to be stunned that they are not the only victims of TTB. Reading about their colleagues' similar experiences and sharing their personal victimisation is important to Tiffany and Margaret: 'I am so glad to see this article and be able to read all these messages. I am being cyber bullied…' and 'I think this article and these comments show how little people know of how bad it is'. In addition, Pablo wrote:

I am surprised that the 'bullied teacher' term actually exists … I looked for it and found this website and didn't know this forum actually had a lot of people sharing the same experience as I have.

The posts create the impression that TTB is on the increase. Doreen, who has been teaching for 35 years, wrote that 'the climate of the classroom and student behavior changed drastically over the years'. Likewise, Saundra Delgado wrote that:

… as a veteran teacher, I always shrugged off students' inappropriate comments as immature behavior. Now, with technology at their fingertips bullying is alive and well … I have never experienced bullying like this school year.

Lisa concurs with the view that TTB is escalating: 'It is progressively getting worse'. Jacques Tobin wrote on 27 March 2018: 'I taught school for 25 years, and the last 3 or 4 were complete misery'. Carol Nevius, on the other hand, believes TTB has been part and parcel of the plight of a teacher for a long time ('Over the years, there have been many instances of bullying against me, the teacher.').

Whereas websites such as The *Educator's Room* and research (e.g. De Wet & Jacobs, 2018; Kauppi & Pörhölä, 2012; Woudstra et al., 2018) create an awareness of the prevalence of TTB, a scarcity of large scale quantitative longitude studies (cf. Kõiv, 2015) hinder the affirmation of the views of several commenters that TTB is on the increase. It should be noted that only five of the 66 commenters who took part in the Internet conversation were not victims of TTB. People who post comments on a website usually have an interest in the topic under discussion. It is thus understandable that the comments on TTB are nearly always about their and/or others' negative experiences.

Commenters' understanding of TTB

Numerous commenters described in detail how they were verbally and physically abused and humiliated by their learners on the school grounds, in classrooms and public spaces, and on social media. An analysis of these comments gives insight into the different types of TTB and the core characteristics thereof.

Commenters were verbally abused by their learners. Katherine wrote about a 16-year-old boy who 'talked down to [her], insulted [her], and then called [her] ugly'. Marilyn Bullard recalled that she was 'openly ridiculed, mocked, and talked about as though [she was] not even there'. Correspondingly, Ellen wrote that one of her bullies 'constantly makes stupid remarks to be funny' while her other bully 'lets loose with a bunch of rude comments'. Numerous commenters were the victims of false allegations that harmed their personal and professional lives. AJ Coco wrote in this regard, 'I have had every lie one can think up reported about me and spread throughout the school'. The teacher quoted above was, among other things, accused 'of using drugs during school and … coming to school "high as a kite"'. Deborah was accused of 'forcefully' throwing a pen at one of her bullies. Commenters were also accused of racism ('Bullying by mean girls'), unfair treatment of learners (Marie), sexual harassment (Kelly Fritschy) and physical assault (Nate NC, Deborah). Some of the commenters were subjected not only to verbal but also physical bullying. A substitute teacher wrote that the learners 'just call [her] names [and] throw things at [her]. Jill Mehlinger, another victim of multiple forms of bullying, wrote 'I have been bullied, threatened, cursed at, lunged at, pushed, and

belittled'. A beginner teacher wrote: 'There is constant disrespect, talking back, fighting, destruction of my property [and] threats against my safety'.

Even though the majority of commenters described incidents of TTB perpetrated on the school grounds or in classrooms, Georgia, a substitute teacher, recalled that her victimisation was not limited to the school setting. She resides in the community where she teaches. One evening, when she was out to dinner with her family, she saw the learners who bullied her in the classroom. The bullies walked up to her, and, in front of her husband and children, laughed out loud and said to her: 'You're that stupid f*ing sub. I am going to get you fired'.

Four commenters wrote that they were the victims of cyberbullying; a form of bullying that transcends physical boundaries. Saundra Delgado wrote the following:

> ... with technology at their fingertips bullying is alive and well. I have been negatively exposed on snapchat, twitter and instagram more than anyone should be posted on these social media sites.

Tiffany's comments highlight the all-encompassing public nature of cyberbullying:

> [The bully] spread allegation[s] anonymously on a public post on social media, rephrasing what I said in class with exaggerating adjectives, saying that I humiliated and threatened her in class. Many people left comments saying that she should call the police and find a lawyer to sue me. Many people used bad words to call me and keep sharing it to others in order to 'give me a lesson to learn about respect'.

Attention will now be given to findings regarding core characteristics of bullying (cf. Kauppi & Pörhölä, 2012) as it crystallised from the data. Theoretically, teachers have power over their learners on the grounds of 'their position as teachers' (Kauppi & Pörhölä, 2012, p. 1061). Teachers may, however, be disempowered when learners gang up against them, and/or openly defy them. This may result in teachers abdicating their power and finding themselves in a situation where they are unable to defend themselves from abusive, bullying learners. The following three comments by bullied teachers illustrate that TTB can be characterised by an imbalance of power. Pablo wrote that he is 'basically being walked over' by two of the learners in his class. Katherine described how two high school learners belittled her, and 'talked down to' her. Marilyn Bullard wrote: 'I often feel bullied, openly ridiculed, mocked, talked about as though I'm not even there'.

TTB is not an impulsive act, the bullies usually intentionally set out to harm or hurt their victims. Numerous commenters wrote that they were the victims of malicious lies, because their bullies wanted to get them fired (e.g. AJ Coco, Marie, Bullied). It also seems as if minor incidents are blown out of proportion: 'If the teacher resists [in giving the learners extra marks], they report some minor offense of the teacher to the administrators of the school' (Shannon Stoney). The bullies not only set out to harm their teachers, but are often successful in their pursuit: teachers were 'repeatedly written up with disciplinary notices' (Margaret), being 'investigated' for fabricated transgressions (Anne), and fired (AJ Coco). Karen H noted that she was left with little recourse than to resign, 'because no matter what I said or did, Admin ALWAYS believes the students'. Jill Mehlinger believes that she is 'being forced into early retirement' because of the 'hostile and unsupportive environment' she is working in. This may have dire financial consequences for her:

'I will have to pay out of my pocket for health insurance, and settle for a lower pension since I am not 65 years'.

The study found, in line with previous studies by De Wet (2010) as well as De Wet and Jacobs (2018), that TTB may have serious negative consequences on the victims' professional lives. Some of the commenters lost their passion for teaching. Debbie Whitlock-Roush wrote, for example, that she 'hated every minute of that class'. Jacques Tobin 'hated' his job as a teacher and 'dreaded every moment' thereof. This may inadvertently result in an increase of absenteeism (Karen H). Numerous victims were upfront about the impact of TTB on their physical and mental health (e.g. Michelle Gengaro, Nate NC). Victims wrote that they take anti-anxiety medication (e.g. Andrea Burgos, MW, Shari L Rivera) and/or sleeping pills (MW). Karen H was diagnosed with Major Depressive Disorder.

Findings from this study resonate well with findings from other studies that also emphasise the repetitive nature and longevity of TTB (e.g. De Wet & Jacobs, 2018). Commenters used phrases such as 'I have been bullied… every day since school began in August' and 'There is constant disrespect…' to emphasise the repetitiveness of the bullying.

Discussion and conclusion

The aim of this study was to use data posted on social media to gain insight into commenters' understanding of the prevalence and nature of TTB. A prevalence study by Kõiv (2015) support a finding from this study, namely that TTB is an escalating and serious problem. Findings from this study, specifically that teachers are physically and verbally bullied by their learners in their classrooms, on school grounds, in public places and on the Internet, is in line with findings by other studies on the different types of TTB (De Wet, 2010; Kõiv, 2015; Woudstra et al., 2018). Findings from this study are furthermore supported by studies (De Wet, 2010; Garrett, 2014; Woudstra et al., 2018) that established that bullies intentionally set out to harm their teachers' private and professional lives, bullying is repetitive and enduring in nature, and it is characterised by a power imbalance between the bully and the teacher. It therefore seems as if findings emanating from comments on *The Educator's Room* in reaction to Sorge's article may be considered trustworthy.

This study has shown that, despite ethical dilemmas, some social media websites can be rich data sources for investigating TTB. Individual teachers' postings on their humiliation and pain are globalised and made accessible to researchers and laypersons alike through use of a medium that transcends borders. Users of social media as a data source should, however, always be aware of the fact that they are working with data that was not originally intended to be used in research and that the commenters did not give informed consent for the use of their comments.

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Experiences and Impact: The Voices of Teachers on Math Education Reform in Ontario, Canada

Abstract

In Ontario, students' declining math performance is currently cited as a major area of concern (Reid & Reid, 2017). In response to this, Ontario is implementing math education policy changes. However, there is no mention of the role of teachers in this reform process. To address this issue, this paper explores and shares teachers' experiences with math reform. I took a qualitative approach and interviewed eight public school teachers who shared their experiences with math reform based on their teaching trajectories. Three themes emerged from the data: (1) math confidence impacts perception and response to math reform; (2) teachers have little to no active role in the math reform process; (3) there is bidirectional impact between math reform and teachers. These findings delineate significant implications for math reform; the need to revere firsthand accounts of teacher experiences and insights, treating teachers as change agents, and engaging teachers in math reform processes.

Keywords: math education, math reform, educational change, teacher, curriculum, policy, Ontario, Canada

Introduction

For the past few years, elementary students' math performance in Ontario has been cited as a major area of concern (Reid & Reid, 2017). This is based on student achievement results from the Education Quality and Accountability Office (EQAO) math and language assessments, which students complete in Grade 3 and Grade 6 (Reid & Reid, 2017; Stokke, 2015). EQAO results from 2009 to 2018 exhibit a steady decline in the percentage of students who had achieved at or above the provincial standard for math in Grade 3, decreasing from 71% to 61%, and in Grade 6, dropping from 63% to 49% (EQAO, 2014; EQAO, 2018).

In response to the EQAO scores, the provincial government implemented Ontario's Renewed Mathematics Strategy (ORMS) in 2016, which includes dedicating sixty million dollars over three years to increase student achievement, and a policy mandating that all school boards across the province have to provide three hundred minutes of math instruction per week (Ontario Ministry of Education, 2016a). After the provincial elections in 2018, there was a shift in ideology, with the Progressive Conservative Party of Ontario replacing the Liberal Party of Ontario, who was in power for ten years. As such, the Progressive Conservatives replaced the ORMS with the Focusing on the Fundamentals of Math (FFM) strategy, retaining the funding from the ORMS but placing emphasis on numeracy and number properties, delivering on the election promise of deviating from the Liberal Party's focus on inquiry-based math (Ontario Ministry of Education, 2018).

In the midst of these changes, neither the ORMS nor FFM documents explain whether teachers were and will be involved in these changes and if they will be

consulted on their experiences after these changes. There is only one statement from the ORMS that mentions teachers' input: 'Data from student, teacher and principal questionnaires, are a key source of information for how the strategy was developed and contributed to the funding model (Ontario Ministry of Education, 2016b)'. However, this statement does not explain what the structure of the questionnaire was, how those questionnaires shaped the strategy, and whether the teachers had any other involvement.

Teachers' input has always been underrepresented in the process of education reform and innovation (Bailey, 2000; Cohen & Mehta, 2017; Priestley et al., 2012). It is essential to consider teachers as active agents in change, because they are at the forefront of implementing change in the classroom, and they have an understanding of the problems they face (Bailey, 2000; Charalambos et al., 2010; Clement, 2013). This includes providing teachers a platform to share their experiences, pedagogies, and insights that would be potentially conducive to effective math reform.

To address this issue, this paper will focus on sharing the voices of public school teachers in Ontario and their experiences with math education reform over the course of their career, including mandated changes in the Ontario Mathematics Curriculum and math policies. Mandated changes, also known as external approach or top-down change is defined as changes initiated by the state, transmitted by the government to schools, with the expectation that teachers will implement them (Clement, 2013). In this paper, the word 'teacher' is used instead of 'educator', because teachers are defined as individuals teaching in direct classroom settings, which is the target demographic of this paper.

Research questions

The purpose of this paper is to present an in-depth understanding of teachers' perspectives on math reform, and how it is shaped by their teaching experience. This will be explored through two core questions:

1) How do mandated changes in math curriculum and policy impact and shape teachers' experiences teaching math?

2) What are teachers' perceptions of their role and representation in math reform?

Method

Sites: I conducted my study in two public elementary schools in Southern Ontario. I chose public schools because unlike private schools, public schools are required to follow curriculum changes mandated by the Ontario Ministry of Education (Ontario Ministry of Education, 2016c).

Participants: I employed a purposeful sampling approach and identified eight teachers from the two schools who have experience teaching math in the classroom.

Data collection: I collected qualitative data through semi-structured interviews. The semi-structured interviews consisted of open-ended questions which were used flexibly, and provided the participants with an opportunity to share detailed descriptions of their distinctive perspectives on teaching math and experiencing changes in math curriculum and policy. Each interview spanned around twenty to

forty minutes in length. Pseudonyms were used throughout, and will be used in this paper in place of participants' real names to maintain confidentiality.

Thematic findings

Three key themes emerged from the data.

Math confidence impacts perception and response to math reform

Teachers' confidence in math knowledge and pedagogy is a key determiner in how they perceive and respond to math reform. James, who reported having confidence in math, stated he would use his own judgment in deciding whether to implement changes or not.

> *I teach good math. If the changes appear to be better for student learning, such as closing the gaps for university or for high school, then I would do that. If I feel the changes do not benefit them in anyway then I will not incorporate them.*

This response reflects the literature on self-efficacy and curriculum changes, how teachers have the self-efficacy to resist changes if they believe the changes do not serve the needs of the students (Charalambos et al., 2010; Gujarati, 2011). Douglas and Shawn also reported having math confidence, but instead of resisting changes, they believed they had the skills to adapt their practices accordingly.

> *I feel pretty confident in my math pedagogy. I feel pretty confident and I am able to help kids meet with success. So as I mentioned a few minutes ago, if something really radical were to change, I think I'll be able to roll with the punches. You know I really have made a very conscious effort and not just with my math teaching but teaching in general to not get kind of stuck in the mud or mired in a certain way. This is the way I've always done it. I'm always looking to evolve my program.* (Douglas)
>
> *I don't think changes impact me in any way. I'm very flexible, I do everything. I have my math specialist, I can do three-part, I can use the math textbook, I could make centers. I use the computers for a group. So yeah, I could do it, teach it in any way.* (Shawn)

These two discrete types of responses indicate that the relationship between teacher confidence and reform response is not necessarily linear. There is however, a common thread between the three teachers with their perceptions of having the agency to respond in accordance to their personal judgment.

Lily reported having lower levels of math confidence. She exhibited uncertainty on how to respond to the prospect of future reform.

> *... sorry I don't know. I guess it makes me nervous because he's talking about how they don't know times tables but, I don't know, I really don't know.*

Uncertainty can stem from dissonance between prior beliefs and current changes, and a dearth of support during change implementation. Teachers who lack math confidence may not be able to respond to uncertainty by using individual judgment or being adaptable. This in turn carries significant implications as teachers who are uncertain are less likely to implement changes, which can lead to reform failure (Charalambos et al., 2010).

In regards to the first research question on how math reform impacts teachers' experiences, the major takeaway is that teachers' confidence in math is a significant

determiner in how math reform impacts their experiences. Hence, teachers' level of math confidence is a factor that is worthy of consideration during the math reform process, as it can help explore and anticipate reform outcomes.

Little to no active role in the math reform process

During the interviews, math reform process was defined as discussing, creating, and transmitting changes to the classroom. All eight participants reported that they were never consulted or invited to actively participate in the math reform process, nor could they recall of any other teachers being involved in it.

Concomitant with the lack of outreach, participants perceived policy implementation as a top-down process, where polices are created and transmitted from the Ministry to the classroom, and teachers have no contribution to this process.

> *I think it's just top-down, there's no input from the teachers. Sometimes I feel it's more reactive, so the scores are low, whoever's in the Ministry, what changes do we think we need to make. And then pass this to the principals and then to the teachers. I don't think the teachers have a say, and I don't think the Ministry understands exactly what is happening in the classroom.* (Shawn)

> *I think it's a top-down approach for sure because it's like, "Okay so we didn't do well on the EQAO scores, so the board is going to provide you with these math coaches to help, to get math scores back up. And then once they are back up we are going to pull those math coaches."* (Sarah)

These responses underscore the participants' perception of the lack of opportunities in being actively involved in creating mandated changes to math curriculum and policy. Douglas expressed his concerns with the top-down approach.

> *I think at times it could be a bit of a broken telephone situation, and sometimes I think decisions made at the Ministry level may not recognize or understand the realities on the ground. And it does have to filter through a lot of different stages, to go from the Ministry to the boards, from the boards to the superintendents, from the superintendents to the principals, from the principals to the teachers, there are a lot of steps in there. Yeah I don't know I find that by the time it gets to me, that practical level, we're suggested that something be done. Then we figure out how to make that work in a way that that makes sense for teaching our students and the learning environment in our classroom.*

Douglas is concerned about the gap between policy and practice, and how policy transmission can get lost in translation by the time it reaches the classroom. This implies that teachers' underrepresentation in reform processes and its transmission is detrimental to the progress of reform implementation.

Bidirectional impact between math reform and teachers

All the participants emphasized the need to consult teachers during reform processes. Below are a few responses in regards to that.

> *Yes, because they're the ones working directly with the students. I know there was a lot of integration with special education and that was done without direct teacher consultations, so I think talking to people that are actually doing the teaching, that are day-to-day interacting with the students probably know better how they learn and would be the people to consult on this.* (James)

I think so. Because, the teachers are the ones that see what's happening and they're the ones that know the children, and what the struggle is. So I think they should have some kind of input to any changes. It shouldn't just be, "We're making a change because of a score". It should be, "Okay yeah the score is low, but what's happening inside the classroom? Let's hear what the teacher has to say, that could help us create something new." So yeah, I think the teachers should have some kind of voice." (Shawn)

These teachers believe that their role as frontline workers is ample reason to be given the opportunity to be actively involved in creating mandated changes to math curriculum and policy. This sentiment is echoed by the literature on treating teachers as change agents (Bailey, 2000; Charalambos et al., 2010; Clement, 2013). Moreover, as indicated by the responses below, participants believe that teachers impact math reform outcomes, as reforms will not be successful if teachers do not implement them.

If the teacher doesn't implement it, then it's not going to be a successful addition to the curriculum. So I kind of think of the sexual education curriculum change, and if teachers don't implement the change, then it's not going to be the way the government designs it to be. (James)

And so when teachers feel like they don't have a voice, when they feel like something is foisted upon them, like a lot of Kindergarten teachers feel, they don't deliver the program. So if people don't feel they have been represented in the curriculum then they're not going to do it. (Lily)

Even though these teachers have not been given the opportunities to participate in the math reform process, they believe they are still being active participants through their roles as frontline workers, by implementing these changes in the classroom, which impacts reform outcomes. In regards to the second research question on how math reform impacts teacher experiences, the participants believe there is bidirectional impact; not only does math reform impact their teaching experiences, but their roles as teachers impacts math reform as well.

Conclusion: implications for future math reform

The thematic findings from the interview data indicate significant implications for future math reform. Firstly, the firsthand accounts of teachers and their experiences need to be revered. The findings from this paper provide an in-depth outlook on teacher confidence and how they perceive their positions in the policy implementation landscape. It was possible to garner such rich data only because I interviewed the teachers directly. Kyle even mentioned how this method was an effective way of consulting teachers.

I would say yes they should be consulted. The format of how the consultation happens should be up for debate. I don't know if I need to be called into a town hall to offer my thinking on things. People should be doing research projects, like yourself, getting feedback from teachers that way.

Secondly, it is essential for education stakeholders, including policymakers, and researchers, to treat teachers as change agents. Teachers are the frontline workers who implement education changes into practice, gauge its effectiveness in the classroom, and impact the outcomes of those changes.

Lastly, it is essential to actively engage teachers in math reform processes. As the participants indicated, if the mandated changes or implementation methods are discordant with teachers' personal beliefs and experiences, then they will not be implemented. Teacher engagement is both an inclusive and lucrative effort, as stakeholders would be lessening the chances of reform failure, because teachers would be providing input on which ideas might not translate effectively into practice and vice versa. Their insight and feedback are imperative in monitoring the progress of reform.

As education stakeholders in Ontario continue to tread through the journey of math reform, it is necessary for them to consider the voices of teachers in that process as well.

Acknowledgements

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The Role of the Bulgarian Presidency of the Council of the European Union for the Implementation of Glocal Education

Abstract

With regard to the Bulgarian Presidency of the Council of the European Union, in the beginning of 2018 the National Association of the Municipalities in Republic of Bulgaria launched a call for proposals under the Grant 'Support of the Municipal Initiatives Related to the Local Dimension of the Bulgarian Presidency in 2018'. The Municipality of Kostenets proposed and implemented the project 'Raising Awareness of the Bulgarian Presidency of the Council of the European Union' with the participation of a team formed by students and teachers from 'Georgi Sava Rakovski' Vocational High School. The activities of the team included: 1) research of information about the European Union and the Bulgarian Presidency; 2) project based teaching, where students and teachers learnt together about the role of the European funds for the development of Kostenets Municipality; 3) active citizenship through students' participation in discussions about global and local issues with a member of the European Parliament, the town mayor and municipality experts. The project gave opportunities to the students to understand and experience the dimensions of the glocal education, to appreciate the citizenship not only as consumers' privileges but also as personal responsibilities, to raise their awareness for the global issues and to believe that each of them can contribute to the common good at local and global level.

Keywords: glocal education, civil education, active citizenship

Introduction

With regard to the Bulgarian Presidency of the Council of the European Union, in the beginning of 2018 the National Association of the Municipalities in the Republic of Bulgaria launched a call for proposals under the Grant 'Support of the Municipal Initiatives Related to the Local Dimension of the Bulgarian Presidency in 2018'. The Municipality of Kostenets proposed and implemented the project 'Raising Awareness of the Bulgarian Presidency of the Council of the European Union' with the participation of a team formed by 12 students, 3 teachers and the director of 'Georgi Sava Rakovski' Vocational High School. The project aimed to demonstrate the importance of the Bulgarian EU Presidency for the country, enabling students to develop their civic literacy, communication and organizational skills and to increase their commitment and engagement on issues related to the future of Kostenets, Bulgaria and Europe. Although the project was not conceived as a project for glocal education, its implementation helped students to look glocally at the world we live in, and it included the three dimensions of glocal education: teaching, research and citizenship.

A good practice from 'Georgi Sava Rakovski' Vocational High School and Kostenets Municipality

The students from 'Georgi Sava Rakovski' Vocational High School participated in the municipal project on a voluntary basis mostly through extracurricular activities and succeeded in performing all project activities as planned.

In the first activity, the students organized a campaign to promote the role of the Bulgarian EU Presidency – they distributed 200 information brochures in the Municipality of Kostenets, communicated with familiar and unfamiliar people either skeptical or open minded. Later in March, the students conducted a survey among the citizens of Kostenets distributing 100 questionnaire cards related to the Bulgarian Presidency's messages and priorities. Through meetings with ordinary people, the students gathered their first impressions about the local way of thinking of the Bulgarian Presidency, the role of Europe for Bulgaria and the distance between local expectations and national and European realities.

As part of the project, it was held a meeting-discussion 'United Europe – as we want it to be' with the participation of a Bulgarian member of the European Parliament and the town mayor – representatives of different political parties, municipality experts, teachers and students. Before the meeting, the students researched the portfolio of the Bulgarian member of the European Parliament, the aims, structure and values of the European Union and formulated their questions about the opportunities and challenges of young people in Kostenets, Bulgaria and Europe. Some of the questions included: What helped you to evolve from a small town to the position of a member of the European Parliament? What should be the starting salary of the young people in Bulgaria? Could the EU Presidency contribute to the development of tourism in Bulgaria? etc. The representative of EU Parliament responded to the questions and gave his opinion on many current local national and European issues such as: for and against the Istanbul Convention, the advantages and disadvantages of the European market for Bulgaria, the opportunities for development of rail transport and shortening the travel time from Kostenets to Sofia and many others. The students were impressed to discuss these topics with political representatives in their small town, to see their own importance for the future development of the area and how local and global constantly interact between each other.

At the end of February, the 'Georgi Sava Rakovski' Vocational High School organized a meeting with teachers and experts from the Municipality of Kostenets. They presented information about the implemented projects at school and in Kostenets Municipality funded by different programs of the European Union in the field of infrastructure, tourism, young people and social services. The students could ask questions and give their ideas and proposals for future projects and took part in a mini-debate entitled 'Advantages and Disadvantages of Bulgaria's Membership in the European Union'. All these activities aimed to develop their skills in critical thinking, public speaking and active citizenship. The meeting provoked students to search for information and photos, showing the contribution of the EU programs for the Municipality of Kostenets and together with their teachers to prepare a presentation and a leaflet for an official event on The Day of Europe (9th of May) in the Municipality of Kostenets. The process of researching, gathering, selecting and presenting information enabled students to realize the local effect of the global

political and economic decisions as well as the role of personal decisions to exercise civil and political rights – not only with consumers' attitude but also with conscience, responsibility and criticism.

As part of the municipal project activities, students visited the EU Information Center in Sofia, where they built up the knowledge they had had about the EU and the Presidency of Bulgaria, about the structure and organization of the European institutions and the European Union's objectives.

The effective cooperation between 'Georgi Sava Rakovski' Vocational High School and Kostenets Municipality resulted in additional meetings where the students presented different ideas for development of the tourist sites in the municipality and the inclusion of additional attractions and programs to attract more tourists. The meetings had two main objectives. On the one hand, to examine the priorities for developing community tourism through the prism of young people and thus to receive fresh and alternative ideas. On the other hand, students expressed their civic position in front of the local authorities and realized that their opinion is important and taken into account.

Conclusion

Addressing glocal education was not the initial focus of the project 'Raising Awareness of the Bulgarian Presidency of the Council of the European Union' in the Municipality of Kostenets, but indeed, it made progress in the achievement of the glocal educational goals. The project succeeded to raise the civic awareness among young people and to show that the dimension of citizenship includes not only privileges, but also responsibilities. It made them believe that every one of them can contribute to the common good at a local and global level. In conclusion it could be inferred that the joint projects between schools and municipalities such as the one presented here, could be considered as good practices for promoting glocal education and active citizenship among young people and this initiative is worthy to continue in a larger scale and on a regular basis in the future.

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Education Capture: The Interference of Teacher Unions in the Schooling System in South Africa

Abstract

The paper investigated education capture and the interference of teacher unions in schools by their involvement in the corruption of selling teacher posts. Qualitative approach, an interpretive paradigm and capture theory of regulation were used in understanding the phenomenon of education capture. Methods used in gathering information consist of a literature review and document analysis. In addition, the final report of 16 May 2016 of the Ministerial Task Team appointed by the Minister of Basic Education to investigate allegations into the selling of posts of educators by members of teachers' unions and departmental officials in provincial education departments was also used as a source in investigating education capture.

Keywords: education capture, selling of teacher posts, teacher, professional development, unions, corruption, interference

Introduction

The paper aims at understanding education capture and the role of teacher unions in the selling of teacher posts in schools. The paper stems from allegations in the media that some members of teacher unions and department officials were involved in illegal activities involving the selling of teacher posts. The Minister of Basic Education, held meetings with various stakeholders including Teacher Unions, as well as the Associations of School Governing Bodies and a consensus was reached to investigate the allegations. It was thus agreed that a Ministerial Task Team, instead of a Commission of Inquiry be established by the Minister to probe these allegations. Prinsen and Titeca (2008, p. 151) are of the view that 'when the position of national elites is weakened, local elites may capture decentralised public services and escape the control of the national state and the local elite's interests are dominated by a small group of better educated and networked individuals'. In this paper 'education capture' is defined as when teacher unions dominate all stakeholders (learners, teachers, parents, School Governing Bodies, School Management Teams, district officials, etcetera) involved in schools. Capture theory of regulation was used in the understanding of education capture. This theory asserts that regulated groups are able to control or 'capture' the agencies, which regulate them, thereby insuring that regulatory decisions will be uniformly consistent with the interests of the regulated.

The capture theory suggests there are certain inherent features of the regulatory process and environment that determine the fundamental nature of the regulatory process and guarantee the dominance of the regulated group in influencing regulatory decisions. Thus, the creation of a regulatory agency is characterized by a

struggle between a diffuse majority favouring regulation – the public, and a powerful minority resisting regulation – the regulated group. Once an agency is created, the public loses interest, content that the threat to the 'public interest' has been averted. In contrast, the regulated group maintains interest, because it has a much more concrete stake in regulatory outcomes. Faced with such a pattern of group interests, the regulatory agency gradually adopts a posture of serving and defending the regulated group (Berry, 1984).

Method

The paper investigates education capture and the role that teacher unions played in the corruption of selling teacher posts in the schooling system in South Africa. Qualitative approach, interpretive paradigm and Capture theory of regulation were used by the author in understanding education capture in the schooling system in South Africa. Methods used in gathering information consist of a literature review and document analysis. In addition, the final report of 16 May 2016 of the Ministerial Task Team appointed by the Minister of Basic Education to investigate allegations into the selling of posts of teachers, by members of teacher unions and departmental officials in provincial education departments, was used as a source in understanding education capture.

Teacher professional development

The demands of contemporary society challenge teachers as key actors in formal educational systems. These challenges are often related to the identification and definition of key competences that need to be developed in the teachers and further fostered during their professional development (Nuñez, Derluyn & Valcke, 2019). Self-confidence, discrimination, family responsibilities, qualification, experience, ethnicity, age and institutional racism, etc. are barriers for teachers to access continuing professional development opportunities (Mboyo, 2019). Teachers need to be developed and to have strong communication skills, to collaborate within different contexts and school cultures and to have administrative support to influence their professional development (Taylor et al., 2018). Prolonged development interventions and continuous reflection are necessary for teachers to change their practice and make changes sustainable, even if on the way towards those goals teachers might show their individual learning path (Kiemer et al., 2018). Key components needed for successful implementation of professional learning communities should include shared beliefs, values and mission; shared and supported leadership; supportive conditions; caring and respect among members; and collective learning with intentional sustained focus on student needs. Core elements that teachers should know in their development should include promoting the culture within and outside school, gaining active engagement from families and community, and building sustainable leadership with good moral ethics. This type of professional development ought to be aligned to transformational learning theory in that teachers need to be empowered to take ownership to identify and solve problems to affect their teaching and outcomes for their students (Baird & Clark, 2018).

There is a tendency for professional development undertakings to focus on technology and not on pedagogy and ethics. *Pedagogy* denotes the essential dialogue

between the events of teaching, learning, and the way we think and talk about plan and structure those events. Pedagogy ought to encompass a way of knowing and a way of doing. In developing teachers professionally, teachers are not only expected to act professionally, but the expectation is for them to behave professionally and ethically. Therefore, teacher professional development needs to focus on assisting them in acquiring on-the-job knowledge, skills, and capabilities relevant to the discipline and the profession. In addition, advanced teacher professional training needs also to adopt the professional values and behaviours that society associates with being an ethical professional. Rather than being explicitly taught, however, much of what is learned ought to be acquired tacitly through observation of role models and enculturation in professional practice settings, often termed the 'hidden curriculum' (Mahlangu, 2017).

Teacher professional development ought to focus on mediating outcomes (teacher knowledge, beliefs, and practices) for understanding the process by which professional development programmes might affect student learning. In addition, the focus should be on ethical conduct, content, classroom applications, and on opportunities for teachers to interact with and learn from each other ethical conduct (Griffi et al., 2018).

Glocal interference of teacher unions in education systems

The paper explores education capture in relation to the main problem investigated by the Ministerial Task Team as to how to reduce, if not eliminate corruption in the selection and appointment of candidates for posts in the Department of Basic Education. Thus, the focus has been on two areas: the environment generated by the Department of Basic education and the Teacher Unions, and the processes by which recruitment and selection occur.

According to the Department of Basic Education (2016, p. 18), 'the Department of Education is effectively in control of education of one-third of South Africa's provinces'. In other words, where authority is weak, inefficient and dilatory, teacher unions move into the available spaces and determine policies, priorities and appointments achieving undue influence over matters, which primarily should be the responsibility of the department. Therefore, weak authorities, aggressive unions, compliant principals and teachers eager to benefit from union membership and advancement are a combination of factors that defeat the achievement of quality education by attacking the values of professionalism. This may contribute to education capture. In the South African Education sector, non-professional bodies (such as School Governing Bodies (SGBs)) are tasked with the recruitment and selection of professionals. This seems to undermine the credibility of the process. Dysfunctionality of SGBs add doubt about the validity of staff selection. Given its historical legacy policy and practice, the education sector has features that are different from other public service sectors (Ibid, 2016).

The challenge that the paper views as education capture globally, appears to be the uncertainties in Asia in the coming years of how to meet the expectations people have come to entertain in this region, due to the phenomenal improvement in their standard of living over a generation. With Brexit and the election of Donald Trump as U.S. President in 2016, the rise of populism, nationalism, anti-globalism, anti-liberalism, racism and the 'retreat of democracy' are some of the examples of

education capture worldwide (Shiraishi, 2019, p. 19). In support of Shiraishi (2019), González (2019, p. 45) is of the view that Latin America's coercive institutions exhibit 'profound weaknesses, characterized by poor training, low specialisation, ineffectiveness, extra-legal violence, and widespread corruption'. Despite profound deficiencies, the region's police have successfully blocked structural reform altogether, as in São Paulo, or frustrated reform for years, as in Buenos Aires. Another example is that trade unions in post-communist countries proved to be weak and passive, despite the greater scope for independent labour mobilization and the concerted effort to establish tripartite institutions. Similarly, some scholars have stressed the role of communist legacies in producing weak, co-opted unions that were accustomed to collaborating with government and managerial elites in order to ensure orderly production. There is also the legacy of the early post-communist period, when newer unions sought to leapfrog unions descended from the communist era by embracing the turn to capitalism but failing to mobilize labour (Hartshorn, 2019). National reports from the English educational sector highlight discrimination against individuals on a variety of reasons including gender, religion, and sexual orientation, and race-related discrimination and this can be seen as education capture (Mboyo, 2019).

At the Annual Conference held in the Channel Island of Jersey in 1983, in Britain, the National Union of Teachers (NUT) passed one of its first resolutions in favour of world peace and against the nuclear arms race. After the Jersey Conference, the National Union of Teachers began to mobilise the teachers around the fluttering banners in support of the British peace campaign against the nuclear armaments race. As a result throughout 1983 the union carried out the following activities: peace demonstrations together with other British unions affiliated with the Trades Union Congress (TUC); making demands on the British government that it should take part in international negotiations with a view to ending the arms race and bringing about nuclear disarmament (both short and long-range missiles) (Ferreira Jr., 2019). Thus, it was clear that as far as the national direction of the NUT was concerned, having a good education was something that was organised around education for peace and the values of cooperation were considered as important in educating students. However, the British government took a different view and systematically attacked the pacifist policies, which they believed the teachers were inculcating in the state schools. As a result, when the International Peace Conference proposed by the NUT was held in the first half of 1984, the union was strongly opposed by the Conservative government of Mrs Thatcher and the Cold War reached its most critical phase with the installation of new nuclear arms in the continent of Europe (Ferreira Jr., 2019).

Findings

The practice of selling posts whether through the exchange of money or other favours, such as sexual favours, is widespread though under reported in schools. The under reporting can be attributed to the fact that the seller and the buyer of the post operate in high secrecy and in some instances with intimidation. SGBs were regarded as having been politicised and that, combined with pressures exerted by unemployment tend to make people behave unethically. Undue influence is made possible by the incapacity of SGBs and community levels of understanding of the

appointment processes, and the role played by the Resources People and 'anomalies in the system'. Managers found that the South African Democratic Teachers' Union takes charge if Circuit Managers do not act. Unions were experienced as powerful and threatening and the solution is that the leadership by SGBs could remedy the situation. According to the Ministerial Task Team, all Unions acknowledged that the selling of posts exists and the South African Democratic Teachers' Union nationally called the exchange of money and other favours for posts 'wide spread and under reported'. Nonetheless, they pointed out that this was but one, perhaps a minor one of the many forms of undue influence and corruption at school and Departmental levels. The Executive Director alleged that SGBs are not trained satisfactorily to deal with the appointment processes. For example, in most rural areas, there are no educated parents and thus the principal is the only one who guides and influences the School Governing Bodies.

The Executive Director is aware that malpractice occurs. The remedy is that principals and District officials need to be trained to conduct the process of interviews and recommendation and to provide support to schools. The Suid Afrikaanse Onderwys Unie (SAOU) in its preamble said that it sought a fair, objective and transparent process for the appointment of teachers. The system should respect labour rights, the Constitution, administrative justice, the law and the Education Labour Relations Council (ELRC) collective agreements. SAOU has come across no instances of the selling of posts.

SAOU is of the view that problems in the system, amongst others, include the deployment of cadres by big unions with the result that their members are influential at all levels of the Department of Education. Some problems occur when the third nominee and not the SGBs first and second choice is appointed by the Department of Education. Observers do not always behave objectively and dispassionately during the promotion processes. In SAOU view, parents from all strata of society are capable of using the SGB system of appointments constructively. The weak area is not the poor or rudimentarily educated parents, but the source of irregularities in this regard is located in the District Offices of the Department of Basic Education. For that reason, the deployment of officials to the Department of Education from teacher unions weakens the department.

Conclusion

In this paper, it is argued that the buying and selling of posts is education capture. Consequently, all teacher unions in South Africa were clear in their condemnation of this practice and they declared that they had taken care to inform their members about the illegal and corrupt implications of such actions. Therefore, teacher unions are in no doubt that, this practice does occur but no specific or substantial cases had come to their notice. In addition, teacher unions were keen to distance themselves from this practice and the Ministerial Task Team was asked specifically to make an absolute distinction between the unions' policies and the possibly errant behaviour of individuals, who are teacher union members. Posts are being sold for cash and the parties operate in networks. There is a climate of fear that keeps people from exposing these practices. Union influence often exceeds the regulatory bounds, especially where administrative action is weak on the side of department.

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Pedagogical Leadership in Early Childhood Development: A Means for Quality Practices through Professional Training

Abstract

The purpose of this conceptual paper is to highlight the significance of pedagogical leadership (PL) in improving the quality of practice in early childhood development (ECD) centres. ECD in South Africa is defined as the procedures by means of which children from birth to 9 years grow and flourish emotionally, morally, socially, physically and spiritually (DoE, 2001, p. 7). The paper further argues how professional training and development can equip ECD leaders and teachers with the necessary skills for pedagogical leadership. Currently, in South Africa the majority of ECD leaders, especially those in the previously marginalised ECD communities, have assumed their positions without any professional training. Most ECD leaders are owners who react to the government's call to establish ECD centres in order to make ECD services accessible to all South African children. Leadership in ECD is a less discussed and poorly researched subject in South Africa. Pedagogical leadership in ECD is defined and its status in South Africa is examined in this paper and suggestions are made concerning how it may be transformed and developed.

Keywords: leadership, early childhood development, professional training, quality, pedagogy

Introduction

Leadership in ECD has not been a well-researched subject, but currently considerable attention is being paid to the importance of leadership in early childhood. In primary and high schools in South Africa there has been a great deal of discussion and many debates directed at different forms of leadership, such as instructional, transformational and distributed leadership. 'The field of Early Childhood Education and Care (ECEC), has engendered a growing interest in Pedagogical Leadership (PL) arising from the need to increase quality and influence organisational change' (Andrews, 2009, p. 55). Leaders within any organisation have a major obligation to direct the organisation towards the realisation of organisational goals. This can be achieved through the leaders' efforts to promote and support a quality milieu for teaching and learning outside the day to day administrative chores. It, therefore calls for a different kind of leadership, which is referred to as pedagogical leadership.

PL requires a shift from focusing solely on administrative and managerial responsibilities to also directing attention to teaching and learning. It requires content knowledge and an understanding of the field in order to provide needed support and guidance. This author argues that both the ECD manager and the teacher are pedagogical leaders within the ECD space, but with different roles and responsibilities.

ECD leadership should be in a position to lead and support teaching and learning practice in the right direction. The teacher is also a pedagogical leader in his/her own space where the exhibition of credible knowledge and understanding of teaching and learning in the classroom is expected. This knowledge and understanding should impact on practice positively to such an extent that it improves quality.

The early childhood development sector is an area that needs to support and promote high quality early learning settings for young children. Therefore, the most important task that leaders in the ECD field can undertake is to advance and improve the teaching and learning milieu so that it is of a high quality. Andrews (2009) argues that to do this beyond completing administrative tasks performed by leaders, pedagogical leadership is required. This is currently more frequently found in teachers' dialogues and publications, than in practice in the field. PL is the concept that could drive quality ECD practice. According to Rodd (2013), PLs endeavour to implement the philosophy and vision of the centre through mentoring and functioning with other teachers, whilst advocating viewing children as competent and capable. The challenge in South Africa is that the majority of ECD leaders and teachers have not had some professional training and this often has a negative influence on the quality of their practice. Fonsen (2013, p. 182) supports this notion by indicating that 'PL is needed in providing high quality Early Childhood Education (ECE)'. Globally, there is considerable interest and debate in the area of leadership which, according to Strehmel (2016, p. 344), 'is crucial in enhancing quality in early education'. In the field of ECEC Andrews (2009) believes that increasing attention has been given to PL, arising from the need to increase quality and influence organisational change.

Quality practice in ECD

Quality is seen as 'an ongoing method of evaluating, assessing, monitoring, guaranteeing, maintaining and improving the quality of Open Distance Learning (ODL) education systems, institutions and programs' (Mahlangu, 2018, p. 147). High level quality practice within an ECD space is important in achieving organisational goals which contribute significantly to the ground work for the success of children in school and in life. Taguma et al. (2012, p. 13) see quality as 'a starting point in the discussion of ECEC among researchers because it can be best defined in terms of qualifications and value judgments'. A majority of South Africans attach quality to qualifications as they believe more can be expected from a qualified person. There is an expectation and belief that the better qualified people are, the more they will show high quality in their practice and bring positive growth and development to organisations. Defining quality of practice in ECD may be based on different countries' contexts and may also depend on the quality of leadership provided. Quality practice, amongst others, is an organisational goal that ECD centres should strive to achieve.

The achievement of quality practice requires well equipped leaders who will direct the ECD centre along the desired path of sustained teaching and learning. Heikka and Wanigayaneke (2011, p. 510) argue that 'it is time for ECE teachers to step up and lead pedagogical conversations within their classrooms and beyond'.

Fonsen (2013) is also of the view that the delivery of high quality early childhood education necessitates pedagogical leadership.

ECD leadership in South Africa

ECD in South Africa is led by three governmental departments: the Department of Social Development (DSD), the Department of Health (DoH) and the Department of Education (DoE). Each of these departments is accountable to ECD in terms of compliance with social, health and curriculum matters as well as governance issues. The three government departments have different responsibilities with regard to achieving quality practice and service in the ECD sector. PL in the South African context will manifest itself within the DoE which is responsible for teaching and learning.

According to the definition, ECD in South Africa is split into three categories. The community centres that cater for children from birth to 4 years, the school-based centres that cater for pre-Grade R and Grade R learners, and that of Grades 1 to 3 learners in the Foundation Phase. Both ECD teachers and centre managers are expected to provide leadership which will lead centres to achieving organisational goals. Researchers attest to the fact that ECD leadership in South Africa needs attention. Aligning herself with Heika and Wanigayaneke, this author believes that it is imperative that South African ECD departments, non-government organisations, teachers and principals start a conversation around PL.

Pedagogical leadership

Ord et al. (2013, p. 1) define PL as 'the way in which the central task of improving teaching and learning takes place in educational settings as leadership focuses on curriculum and pedagogy rather than on management and administration'. According to Robinson et al. (2009, p. 8), 'PL has a direct connection with positive results for children'. They further assert that pedagogical leadership places an emphasis on educational purposes. Clarkin-Phillips (2009, p. 22) suggests that pedagogical leadership 'commands particular interest because it is pedagogy that impacts most immediately on children'. The author of this paper argues that pedagogical leaders are more concerned about the impact that their leadership has on persons within the organisation. In an educational environment the leadership that exists ought to have a positive influence on the outcomes of the organisation and, therefore, impact positively on learners.

Robinson et al. (2009, p. 38) maintain that 'PL has an emphasis on educational purposes such as founding educational goals, curriculum planning and evaluating teachers and teaching'. Heikka and Waniganayake (2011, p. 510) believe that the time has come for early childhood teachers to 'step up to the role of leading pedagogical conversations within classrooms and beyond'. ECD centre managers need to take responsibility for understanding and assuming their roles as pedagogical leaders. Pedagogical leaders according to Coughlin and Baired (2013), should ensure that teachers make methods and time to mirror their own learning, practice and realise multiple perspectives. The same applies to ECD teachers who also are not practicing pedagogical leadership. They need to be aware that they are the leaders and managers of their own classrooms and, therefore, need to direct

teaching and learning in their classrooms. It is important that they take the initiative of leading and transforming practices in their classrooms in an innovative way that will yield excellent outcomes. The principal's challenge as a centre manager is to ensure that she/he works with teachers to encourage high levels of classroom practice and raise the quality of teaching and learning as well as academic achievement of learners. Currently what is happening in South Africa, is that the majority of ECD centres in previously disadvantaged sites, have both principals and practitioners who are not professionally trained. This was noted during the period when the author was working for the Department of Education at a District level responsible for supporting and monitoring ECD practitioners from 2009 to 2016 September when profiling practitioners.

Professional training and development: a means for quality practice

Goldstein and Ford (2002 in Aguinis & Kraiger, 2009, p. 452), refer to training as an approach to learning and development that is systematic in improving organisational, team and individual effectiveness. They also refer to development as activities leading to the attainment of new abilities or an understanding for purposes of personal growth. Modise (2017, p. 73) claims 'that better qualified personnel with specialised or professional training are important in determining the quality of practice and production which also applies to ECD centres as learning organisations'. Having leaders who have specialised or professional training is more likely to transform organisations into ECD practices that are of a high quality. Melhuish et al. (2016) advocate on-going professional development (PD) for increased pedagogical knowledge and improved quality in ECD practice. ECD leaders with pedagogical knowledge impact positively on the quality of practice and yield positive learner outcomes.

Continuous staff development ensures continuity, strength and enhancement of quality practice. According to Melhuish et al. (2016, p. 3), 'there is ample evidence that providing sector-specific qualifications and professional development for educators, improves children's learning and wellbeing'. The same applies to centre managers and teachers. The professional development of ECD leaders and teachers is important to the quality of practice at their centres. Professional development can, therefore, be used to transform ECD leadership in South Africa through internal and external training, mentoring and coaching activities and by encouraging the formulation of communities of practice. Major improvements in the South African ECD leadership sector can be brought about by transformation which will be a learning experience for all involved. Anderson and Anderson (2001, p. 39) define transformation as 'a drastic change which is so important that it requires a change of mind, behaviour and culture'. In other words they mean that transformation demands a revolution in human awareness that completely changes the way an organisation and its people see the world. To transform the current status of ECD leadership, it is imperative that leaders are immersed in intensive continuing training.

Internal and external training

Modise (2017) cites the importance of training in finding solutions to problems identified and applied in organisational development and also promoting employee

improvement. Training events and proceedings may encompass variety of methodologies, which Sheridan et al. (2009, p. 6) provide clear examples conferences, in-service presentations, workshops, discussions, live or web-based lectures, behaviour rehearsal, live or video demonstration, tutorials, manuals, and a host of other modes, synchronous and asynchronous, that divulge information and endeavour to affect professional practice.

Mentoring and coaching play an essential part in transforming and improving employee practices for the successful achievement of organisational goals. Mentees also need to be encouraged to form communities of practice where they have opportunities to interact with other colleagues.

Mentoring and coaching

According to Fransson and Gustafsson (2008), mentoring involves interaction between parties where they discuss issues, such as teaching and learning and ways of supporting and encouraging mentees. Mentoring is a strategy for achieving proficient, individual and organisational development. By creating a supportive culture, mentoring can provide an environment for transformative learning to occur. Through this experience mentoring becomes a transformative relationship in which individuals reconstruct their potential selves. Teachers learn, grow and change; success is evidenced by developed skills and joy in the collaborative experience and an enthusiasm to continue after they have accomplished their initial goals. The training process of mentoring and coaching can be conducted by means of instructions, discussions, facilitation, teamwork, problem solving and feedback. 'Coaching is said to be a collective activity and it is through engaging with planning that one can build trust and change norms' (Fletcher & Mullen, 2012, p. 56).

Communities of practice

Wenger (1998, cited in Wenger, 2002, p. 235), defines communities of practice (CoP) as groups of individuals who come together on the basis of a common professional interest and a desire to improve their practice in a particular area by sharing their knowledge, insights and observations. Wenger (2002) further explains CoP as the building blocks of social learning because they are social containers of competences that make up such a system. CoP may be regarded as the practise of continuing professional development that is mostly known and practised in the ECD sector and is an intervention to equip and empower each other. The quality of ECEC processes, i.e. interaction between educational professionals in ECD, is influenced by quality orientation and structure.

Implications for practice within the South African context

Since some studies, including those of Clasquin-Johnson (2011) and Modise (2017), suggest a lack of professional training in the majority of ECD centre managers and teachers, it is imperative that conversations should begin concerning how all the adults dealing with young children may be empowered pedagogically. Government departments and Non-Governmental Organisations (NGOs) need to start these conversations. Continuous internal and external training planned by NGOs and private training institutions for ECD leaders, will benefit the sector and

impact positively on the performance of managers and teachers and, ultimately, on learner outcomes. Centre managers and teachers need an understanding of ECE practice to be able to provide PL. For current leadership to be evident in education contexts, PL need to be more precise in its approach, given that it is concerned with context, people and development and the construction of knowledge.

Conclusion

Transforming leadership in ECD demonstrates strong links between professional development through internal and external training, mentoring and coaching as well as the formulation of communities of practice. Quality practice in ECD in South Africa is possible through transformed ECD leadership which focuses on teaching and learning and which is, essentially, pedagogic leadership.

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Part 4

Higher Education & Teacher Education and Training

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Higher Education as a Field of Study: An Analysis of 495 Academic Programs, Research Centers, and Institutes across 48 Countries Worldwide

Abstract

The field of higher education studies has expanded dramatically in recent years. Notably, research centers/institutes and academic programs devoted to the field of higher education (tertiary education) has increased worldwide to now include peer-reviewed journals, books, reports and publications. Utilizing secondary data from 277 higher education programs, 217 research centers/institutes, and 280 journals and publications from *Higher Education: A Worldwide Inventory of Research Centers, Academic Programs, and Journals and Publications* (2014), this paper examines the policy actors and scholars engaged in higher education studies across 48 countries. The finding of this study suggests that people living the world's wealthiest countries occupies a position of significant privilege and power with regards to access to higher education research, analysis, and trained human capital. As higher education research centers, programs, and journals around the world expand their understanding of their place in a wider global network of similar entities, supporting one another and particularly under-resourced colleagues around the world deserves increasing attention.

Keywords: international and comparative education, higher education, tertiary education, globalization, internationalization, academic profession

Introduction

Around the world, the number of both research centers/institutes and journals focused on matters of higher education and degree-granting programs in the field of higher education (tertiary education) is growing (Tight, 2012; Tight, 2018a; 2018b). Today, higher education research centers/institutes and journals are perceived as a normal and necessary part of the higher education enterprise to compete in an increasingly competitive market (Altbach, 2016). While research in the field of higher education studies has grown along with the massification of postsecondary education worldwide (McKenna, 2014; McKenna, Quinn & Vorster, 2018; Salmi, 2017), little has been written on this emergent phenomenon, particularly framed in the realities of the contemporary market pressures on higher education institutions. This study fills a distinct gap in the literature by studying the broader phenomenon

of higher education research centers, academic programs and journals, recognizing it has now expanded beyond the West.

The concentration of higher education research centers and programs in a small number of wealthy countries presents a stark geographic divide between those with access to research and training relevant to the increasingly important field of higher education and those without (Altbach & Engberg, 2000; Rumbley et al., 2014; Wright, 2004). People who seek access to higher education scholarship between the West and the East has been extremely unequal (Rumbley, 2015). In addition, there is growing inequality around the world for people to understand the patterns of privilege and wealth when it comes to research and training in the field of higher education (Altbach, 2014). Given these challenges, this paper explores the broad spectrum of policy actors and scholars engaged in the field of higher education studies across 48 countries. This paper attempts to review the role and value of higher education academic programs, research centers/institutes, and journals and publications to provide sound recommendations for policy and practice that will enhance their effectiveness.

Literature review

The emergence of higher education as a field of study began in Europe in the 11th century, with the establishment of universities in Bologna and Paris (Fife, 1991; Fife & Goodchild, 1991). Higher education (or tertiary education) as a distinct scholarly field began to play more significant roles in economic development and were encouraged to make tighter linkages with businesses and industry (Dressel & Mayhew, 1974). However, institutions devoted to the study of higher education did not fully emerge until the early 20th century when several key scholars such as Burton Clark, Martin Trow, Clark Kerr, and Seymour Martin Lipset began to investigate the field of higher education studies as a result of increasing roles and responsibilities given to faculty members (Freeman et al., 2013). Altbach (2014) once noted that there were "no institutions devoted to the study of higher education or educating those who are responsible for university leadership or management until the 20th century" (p. 7). The latter is now necessary, he contends, as higher education has moved from universities that served an elite and small age cohort of students to massification and, along with it, increased responsibilities (de Wit et al., 2017).

For instance, during the 1920s and 1930s, distinguished scholars Floyd W. Reeves, A. J. Brumbaugh, and John Dale Russell from the University of Chicago heavily examined the business practices of selected universities and outlined policies for "establishing principles of administration and finance" for other educational institutions (Dressel & Mayhew, 1974, p. 7). These principles allowed for a standardization of business practices that could be duplicated across the American higher education system. The early framework of institutional research (IR) developed around the same time under the leadership of Werrett Wallace Charters at The Ohio State University. Charters was credited with formulating principles for systematically collecting and organizing university data for in depth examination. With the demand of increasing enrollments, declining faculty resources, and the need to attract more external funding to institutions, the development of institutional

research techniques became necessary in order to provide "empirical evidence upon which some of its generalizations could be based" (Dressel & Mayhew, 1974, p. 8).

Townsend (1989) noted that prior to the early 1950s, only six universities offered a few courses in the study of and higher education rather than a full doctoral degree program. It was only after World War II, with the assistance of the Servicemen's Readjustment Act of 1944, otherwise known as the G.I. Bill, that the "field of higher education began to appear as a graduate program of study to provide formally trained administrators for the new colleges and universities" (Townsend, 1989, p. 4).

Consequently, higher education as a distinct scholarly field of research has become an integral part to most education schools across the world and has expanded to other departments and colleges across college campuses (Freeman et al., 2013; Tight, 2018b). The emergence of higher education as a field of study is thus of great interest for teacher-scholars and practitioners (McKenna, 2014).

Data sources

This conference paper investigates the contemporary practices, challenges, and emerging models of higher education research centers/institutes and academic programs across 48 countries. Utilizing data from *Higher Education: A Worldwide Inventory of Research Centers, Academic Programs, and Journals and Publications*, 2014 by Laura E. Rumbly, Philip G. Altbach, David Stanfield, Yukiko Shimmi, Ariane de Gayardon, and Roy Y. Chan, this paper presents an updated analysis of the existing landscape of higher education as a field of study, policy analysis, and research globally. This inventory provides a basis for highlighting trends in the higher education publishing sector, as well as identifying necessary development to ensure equal sharing of knowledge in the field. It is also a useful guide to the trends in research and analysis in the rapidly expanding field of higher education studies in the twenty-first century.

Examples in the dataset include a history and current trends in the field of higher education, the positioning of the field of higher education around the globe, with a particular emphasis on its steady growth and prominence in China, followed by growth in the United Kingdom, Africa, Japan, and Latin America, and a focus on the importance of increased understanding of the critical role that higher education plays in the economic and social development of countries around the word.

In total, the dataset comprised of 277 graduate-level higher education programs, 217 education research centers/institutes, and 280 journals and publications. Some of the journals and publications – including country, focus, language(s), frequency, publisher, and Web site – was mostly obtained from the journal Web sites. Newspapers and magazines concerning higher education also appear as they are of great importance to the field. When such data collection was impossible due to language barriers or the absence of a Web site, the help of experts from the country of publication was sought.

For example, data from the ASHE Council for the Advancement of Higher Education Programs (2013) and the Shanghai Jiao Tong University (SJTU) Graduate School of Education (GSE) database were combined into this study with the help of experts. Specifically, in China, Rumbley et al. (2014) chose, with the assistance of Chinese experts at SJTU's GSE Center for World-Class Universities (CWCU), to

include slightly fewer than 30 journals circulated nationally, excluding publications that are mainly distributed at the local university level. Additionally, in countries that did not have academic journals specific to higher education, Rumbley et al. (2014) opted to include a few publications with a broader focus but that constitutes a reliable source for higher education researchers.

The criteria for data inclusion in the Rumbley et al. (2014) inventory are:

a) Academic Programs
    1) Focused on teaching and offering a formal degree,
    2) At least one full-time faculty member,
    3) Award a graduate-level degree;

b) Centers or Institutes
    1) Primarily focused on higher education research, policy analysis, or other activities,
    2) Have at least one full-time staff,
    3) Have a budget;

c) Journals/Publications
    1) Primarily focus on issues of higher education,
    2) Recognized as a credible source of information.

It is important to note that Rumbley et al.'s (2014) work builds on two past inventory projects and their resulting publications (Altbach et al., 2006; Altbach & Engberg, 2000). When compared to Altbach et al. (2006) inventory, Rumbley's et al. (2014) revised inventory report found 293 more centers and programs in the 2013/2014 data collection exercise; and 26 more countries were found to host centers and programs compared to 2006. And while these findings may point to more energetic data collection efforts, there are clear signs that the higher numbers are reflective of real (and dramatic) growth (Rumbley, 2015).

Results

This study found the field of higher education between the West and the East is extremely unequal globally. Specifically, higher education scholarship is accessible in mostly English-speaking developed countries, with significant expansion in Europe and Asia. Of the 450+ programs/centers globally, nearly 66 percent of higher education programs/centers are in the U.S., China, and the U.K. Many of the research centers (100 of the 217) have been established since the year 2000 (Rumbley et al., 2014). Furthermore, Mainland China is the most active developer of higher education centers/institutes, with 28 new research centers/institutes established between 2000 and 2012. The United States, however, has the largest number (70 percent) of higher education academic programs; though there are several hundred Chinese universities providing education in the field of higher education today. Only 6 programs were identified in Africa (4 in South Africa, 1 in Mozambique and 1 in Uganda), 3 in Latin America, and 1 in Egypt. It is worthwhile to note that 60 of the identified degree-granting programs in higher education worldwide were launched since 2000, and 33 of these have been established even more recently, since 2006 (Rumbley, 2015). Although the United States is admittedly overrepresented in the inventory and China is underrepresented, together these two countries are home to 81 percent of the 277 identified academic programs

in the field. Only 6 programs across the whole of Africa were identified, 3 in all of Latin America, and just 1 in the Middle East and North Africa region.

To operate efficiently, effectively, and creatively in contexts of uncertainty and change, the higher education sector worldwide also needs a growing corps of academic and administrative staff, with training and education specifically in this field (Altbach, 2014). While student affairs programs seem to dominate in the United States, when looked at from a global perspective, Rumbley et al. (2014) found that they are listed among the least commonly cited specializations or expertise area, with comparative or international studies at 42.9 percent; administration, management or leadership at 41.9 percent; economics, financing or funding of higher education at 33.6 percent; quality assurance, assessment, or accreditation at 25.8 percent, and student affairs or student development at 9.7 percent. Furthermore, a key finding from the dataset is that 1 in 5 (20.7 percent) of the inventory respondents indicated that curriculum and instruction, or teaching and learning, was a particular area of interest or expertise for their center. This result is significant because the need for deeper understanding of the higher education enterprise, beyond personal experience in academia, is crucial for the current (and rising) generation of institutional leaders, managers, and policymakers.

In terms of higher education journals/publications, a significant proportion is produced in the United States – 36.1 percent, followed by the United Kingdom (12.1 percent), China (9.6 percent), Japan (9.6 percent), Australia (3.2 percent), and Canada (3.2 percent). The countries of publication are dominated by the United States with 101 journals (36%), and the United Kingdom (12%). These two Anglophone countries are followed by Japan, China, Canada, and Australia. However, Rumbley et al. (2014) found that 53 journals/publications (19%) have an international focus. Somewhat fewer publications are aimed at a regional audience: 3 in Africa, 2 in Asia, 7 in Europe, 5 in Latin America, and 1 in the Middle East and North Africa region. In total, twenty of these journals are multilingual – being published in English and at least one other language. Other major languages of publication include Chinese (27 journals), Japanese (26), Spanish (15), French (8), and German (7) (Rumbley et al., 2014).

Limitations

This study was limited to only the Rumbley et al. (2014) inventory data of which identifies programs, research centers, and journals devoted to the field of higher education (or tertiary education). For example, if an institution did not complete the 2013/2014 survey to include their directory information with the Boston College Center for International Higher Education (CIHE), the academic program, research center, or journal was not included in the dataset. Additionally, the study was limited in comparing mission types historically, since the original work of Dressel and Mayhew (1974) did not include a comprehensive list of each of the 67 institutions with their designated mission types. Further, the identification and accuracy of mission type was limited to the responses provided by each institution. No further analysis was conducted to verify the accuracy of the reported mission type. The assumption was that the reported type was accurately provided and represented by the participants (Rumbley, 2015).

Discussion

Mapping the global landscape of capacity for, and attention devoted to, research and training in the field of higher education is surprisingly complex work. What is most surprising from this study is that the publication landscape is dominated by the English-speaking world, as evidenced by the languages and the countries of publication. This is a source of concern, as most of the research therefore follows the orientations of a small subset of the global population, emphasizing characteristics of a higher education system that might not be valid for all 48 countries. More importantly, this domination prevents knowledge from spreading in remote places where English language is seldom used or where publications are not available. Efforts have to be made to disseminate research in higher education more widely, by encouraging open source publications as well as appropriate translations.

In many countries around the world, higher education has not emerged as an important area for academic inquiry, and many developing countries are lacking reliable knowledge that can inform policymaking. Regionally, Latin America, Africa, Middle East and North Africa are highly underrepresented, as well as Asia, except for Mainland China and Japan. Efforts should be made to help researchers in these regions and enhance regional collaborations to strengthen the knowledge-based production and transfer of higher education studies (Gayardon, 2015).

Conclusion

The higher education centers, programs, and journals and publication sector is quite uneven worldwide, as some countries can count on numerous entities with diverse focuses, while others do not even enjoy a single entity focused solely on tertiary education. The need to make sure that knowledge is shared more equally around the world is pressing, an effort that should be undertaken by researchers, publishers, policymakers, and advanced practitioners (Proctor & Rumbley, 2018).

Indeed, this paper recognizes the diverse scholars and networks involved in this work globally and provides a greater understanding of these research centers, academic programs, and publications communities. Not surprisingly, very real imbalances are found in terms of the geographic distribution of these organizations and activities, and English dominates as the language of communication in the field. As such, more work needs to be done in order to refine understandings of the higher education network. Examples put forth include a better sense of the role of research centers in shaping the scholarship of teaching and learning; the varied groups of organizations increasingly offering leadership training; and the hybrid fully online higher education professional development courses across the world.

Acknowledgements

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Ethical Sensitivity and Global Competence among University Students

Abstract

Globalization and technology are rapidly changing the world we live in. Preparing students for their role as citizens of the world is an important task in higher education, given the challenges in the focus of global society. Thus, the main objective of this research was to examine the possible relationship between ethical sensitivity and global competence among university students. The Ethical Sensitivity Scale Questionnaire, Global Citizenship Scale and a personal information sheet were administered to a sample of 248 (136 female, 112 male) students. The results indicated that there was a positive relationship between the levels of ethical sensitivity and global competence among students. At the same time there was a significant positive relationship between ethical sensitivity, global competence, gender and academic performance. From the findings of this research, we can conclude that students have high ethical sensitivity and global competence skills, therefore moral development and global competence must become a part of the core mission of global education.

Keywords: ethical sensitivity, global competence, students, global education, citizenship

Introduction

Twenty-first century students live in an interconnected, diverse and rapidly changing world (OECD, 2016). Emerging economic, digital, cultural, demographic and environmental forces are shaping young people's lives around the planet and increasing their intercultural encounters on a daily basis (Buckingham, 2007). Today young people are expected not only learn to participate in a more interconnected world, but also to appreciate and benefit from cultural differences. Developing a global and intercultural outlook is a process – a lifelong process – that educators can shape (UNESCO, 2016).

Nations and higher education institutions are becoming increasingly interdependent through rapid technological innovations and growing transnational collaboration. Frequent calls have been made for institutions to equip students with the necessary skills to become interethnic, intercultural and globally competent citizens (Burstein, 2007). As asserted by Dewey & Duff (2009), "Our global era enquires globally competent citizens".

Preparing students for their role as citizens of the world is an important task in higher education, given the challenges global society faces (Gibson et al., 2008; Chong, 2015). Toumi, Jabot & Lundgren (2008) suggest that global citizenship education should include education on human rights, peace and media, intercultural dialogue, intercultural relations, international relations, and cosmopolitan citizenship.

Education is a basic human right and students need to be equipped with the necessary knowledge and competence skills to succeed in a global world and to be a part of any higher education institution. Furthermore, when it comes to higher education, more attention should be essentially paid to the moral and civic area by examining the ethical sensitivity (an aspect of moral development) of students and by investigating how education can help prepare these students for their role of engaged global citizens.

Ethical sensitivity

Morality can be defined as the active process of constructing meaning and understanding related to social interaction (McFadden, 1998). Moral values refer to opinions on an idea of what is good and bad. According to Strain (2005), morality is built upon for basic constituent processes: moral sensitivity (being aware of a moral problem, if it exists); moral motivation (giving moral values higher priority than personal values); moral judgment (determine which action is the best from a moral standpoint); and moral character (how a person acts when confronted with a moral dilemma). It is considered that of these four moral components, ethical sensitivity is the most important component since it is a condition for the other three (Tirri, 2003).

Ethical sensitivity is a fundamental element of a human moral conduct. Ethical sensitivity was coined for the first time by Rest (1983) and it is the first important component of his four component moral theory. An ethnically sensitive person recognizes moral aspects – involving questions of right and worry of a situation, and is able to identify with the role of another person. Tirri & Nokelainen (2011) indicated that "to respond to a situation in a moral way, a person must be able to perceive and interpret events in a way that leads to ethical action".

The ethical sensitivity of university students is one of the most important predictors of a future professional ethical position. In fact, ethical sensitivity of students is one of the essential requirements so that they can realize ethical problems and perceive events in a way that leads to ethical action (Dellaportas & Cooper, 2011). Also students would be able to think critically about social situations and analyze issues related to real life, in addition to identifying possible solutions creatively and innovatively. If they do not realize ethical problems, they cannot behave ethically.

Global competence

Today, it is necessary to raise citizens who feel responsible towards the entire humanity, who possess a universal awareness. In the literature, any citizen having these characteristics is called "a global citizen" (Nodding, 2004). Global citizenship has been defined as "the sense of belonging to a broader community and common humanities". It emphasizes political, economic, social and cultural interdependence and interconnectedness between the local, the national and the global (UNESCO, 2015). Due to the attention the concept of global citizenship has been receiving in recent years, many international organizations have developed educational materials to ensure that children and adolescents are educated according to this concept.

Hence, developing globally competent students goes beyond the capacity to think critically and creatively about the world (Rexeisen & Al-Khakis, 2009). They

recognize their own limitations and abilities. Globally competent students demonstrate an array at intercultural communication skills and display interest and knowledge about the world and events (Deardoff, 2006).

According to these findings, global competence is a multidimensional capacity. It recognizes numerous skills, including reasoning with information, communication, skills in intercultural contexts, perspective taking, conflict resolution skills, and adaptability. Global competence should not be observed as a sorted set of independent skills, but rather as an involving capacity model that reflects an integrated understanding of an outlook for global affairs (Bucker & Pouts, 2010).

The examination of best practices in the field of ethics and global competence among public high schools allows educators in other school to adopt, modify and integrate ethical sensitivity and global competency skills into the general high school curricula, and create more equitable learning opportunities for all students (Boix Mansilla & Jackson, 2011). Understanding how ethical sensitivity and global competence skills have been integrated into everyday learning will empower other schools and school leaders to imagine how they should begin to offer higher quality learning in this field. So the main purpose of this study was to examine the possible relationship between ethical sensitivity and the global competence level among university students.

Methods

Participants

The sample of students was randomly selected and all of them participated voluntarily. The participants included 248 university students aged between 21 – 23 years. The mean calculated age of the students was 21.85 (SD=8.12). Of all participants, 136 were female (54.86%), and 112 were male (45.16%). The study group of the research included third year students who studied psychology and medical sciences at the University in Tetovo. The success was calculated by the average successes the last year.

Data collection tools

Ethical Sensitivity Scale Questionnaire (ESSQ)

The Ethical Sensitivity Scale Questionnaire (ESSQ) developed by Tirri & Nokelainen (2007) was used in order to measure the ethical sensitivity level. The ESSQ measures the following seven dimensions of ethical sensitivity: reading and expressing emotions, taking the perspectives of others, caring by connecting to others, working with interpersonal and group differences, preventing social bias, generating interpretations and options, and identifying the consequences of actions and options. The instrument consisted of 28 items. It is a five-point Linker scale. The total score is within the range from 28 to 140, with higher scores indicating greater ethical sensitivity. In this study, Cronbach's alpha coefficient for internal consistence was 0.832.

Global Citizenship Scale (GCS)

The Global Citizenship Scale developed by Morals & Ogden (2011) was used in order to measure global citizenship attitudes. The scale consists of 30 items and

three dimensions: social responsibility (including social justice), global competence (including self-awareness, global knowledge and intercultural communication), and global civic engagement (including involvement in civic organizations and global civic activism). The items of the scale are measured on a five-point Linker scale. In the present study, the scale's Cronbach's alpha coefficient for internal consistence was 0.792.

Data procedure and data analysis

Data collection tools were administered by the researchers during the winter semester of the academic year 2018 – 2019. Each respondent was personally invited to complete a paper and a pencil version of the questionnaires. The period for answering the scale lasted 60 minutes.

Statistical analysis of the results obtained in the research was conducted with SPSS 20.0 for Windows package program. The results were analyzed by applying Kruskal-Wallis H-test, Mann Whitney U-test and Spearman correlation coefficient.

Results

In our study we observed that the mean rate of ethical sensitivity was 128.38 (SD=16.24), while the mean rate of global citizenship was 238.88 (SD=16.21). The Kruskal-Wallis test revealed that there was a positive relationship between the level of ethical sensitivity and global citizenship (H=7.237, p<.05). At the same time, the students' skills had the highest rating in taking the perspectives of others (M=23.14, SD=9.12), caring by connecting to others (M=24.12, SD=9.16) and global competence (M=64.20, SD=6.19). The skills they rated at the lowest level included reading and expressing emotions (M=14.34, SD=6.22), identifying the consequences of actions and options (M=12.14, SD=5.28), and global civic engagement (M=54.32, SD=5.18).

The results indicated that there were significant differences between the scores on ethical sensitivity between male and female students. Female students were more likely to read and express emotions (M=23.18, SD=8.34) than their male peers (M=18.14, SD=6.21), z (1, n=248) = -3.921, p=.001. On the other hand male students were more likely to take the perspectives of others (M=16.20, SD=7.65) than female students (M=14.22, SD=5.31), z (1, n=248) = -3.823, p=.001. The difference between female and male respondents was smallest in the dimensions five (Preventing social bias) and seven (Identifying the consequences of actions and options). Moreover, the girls had higher mean scores in the two of three sub-dimensions of global competence, namely self-awareness and global knowledge (z=-5.342, p=.001 and z=-4.325, p=.002), while the boys had higher mean scores in one of the three sub-dimensions of global civic engagement, namely involvement in civic activism (z=-5.723, p=.001). No significant gender differences were found in regard to the three sub-dimensions of social responsibility.

With the statistical analysis of the data, we obtained a presence of a high correlation coefficient between ethical sensitivity and global competence, and an average score during the studies. The results of the Spearmen correlation indicated that there was a significant positive correlation between ethical sensitivity and the average score level (r_s = .296, p<.008). The results also showed that the global competence positively predicted academic performance (r_s = 0.329, p<.001).

Discussion

The results of this study showed that there was a strong correlation between ethical sensitivity levels of adolescents from 21 to 23 years of age, enrolled in the higher education process and one of three dimensions of global citizenship, that is, global competence. The obtained results are similar to the results obtained by other researchers (Narvaez, 2001; Beguilers, 2011). Students should be challenged to recognize and evaluate own values, beliefs and behavior to explore worldwide horizons. This entails recognizing values behind statements, ideas, and perspectives, and evaluating how they relate to students' personal values and knowledge. According to Colby et al. (2003), a person who has less ethical sensitivity is more prone to ignore the existence of ethical issues compared to a person who has more ethical sensitivity.

From the research it can be noted that the achievement of success in learning is influenced by ethical sensitivity. Students with high scores of self-estimated ethical sensitivity had better results in learning. Tirri (2003) found that the privileged position of the maturation of moral thinking still seems to exist at the age of around 20 years. Also girls are more care-oriented and they express emotional feelings to a greater extent than boys. The findings are partially consistent with the literature (Rut, 2009), which suggests that girls are more focused towards their moral orientation and boys are more justice-oriented. This tendency can also be explained by the nature of items measuring ethical sensitivity skills. The majority of them measure care ethics with emotional and social intelligence.

Furthermore, the results indicated that the female generally had a higher level of global competence score than male students. In fact, the girls should be more humility, sensitivity, adaptable, flexible and open-minded to living to other cultures. On the other side, the boys contribute to volunteer work or assistance in global civic organizations. At the same time, the results in our study showed that high-ability students had higher global competence skills. They possessed skills to understand cultural norms of the others, to create a better world that is based on considering and respecting others, to promote responsibility, to collaborate with members of the society or to develop new cognitive skills, which help them to think systematically and creatively (Altbach & Knight, 2007). Globally competent students recognized their own limitations and abilities for engaging in intercultural encounters. They display interest and knowledge about world issues and events.

Conclusion

Globalization and technology are rapidly changing the world we live in. The present globalized era entail students who are equipped with interethnic, intercultural and international understanding, and who are enterable as responsible, knowledgeable and informed global citizens (Bartell, 2003). Therefore, higher education institutions have increasingly emphasized internationalization as a core element of their strategic goals for the next century. Also, educational and instructional leaders need to reexamine teaching strategies and curricula, so that all students can thrive in a globally interdependent society.

The present study summarizes that there is a significant positive relationship between ethical sensitivity, global competence, gender and academic performance

among university students. From these findings it can be concluded that moral development and global competence need to be a part of global education.

Practical implications and further research

For the educational purpose, the findings in this paper suggest that including ethical issues and being attentive to moral development in programs for students might also cause their interest and need attention. The results of this study suggest an advanced ethical sensitivity of this group which might be an additional reason to dedicate attention to ethical and moral issues in programs for students. Simultaneously, global competence needs to be assimilated into everyday teaching and learning. Maybe global citizenship courses can support students in their moral development and provide them an opportunity to be educated in order to develop the required knowledge and skills to succeed in an increasingly interconnected and interdependent global society.

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Perspectives on Global Citizenship Education of Mexican University English Language Teachers

Abstract

Global citizenship education is an attempt to introduce into formal and non-formal education programs issues of global concern and elements of an emerging global civic culture. It aims at creating more fair, peaceful, tolerant and inclusive societies. The broad nature of global citizenship education has led to a range of interpretations and approaches in a continuum that goes from a conservative perspective that contributes to the reproduction of the existing social order, to more critical approaches that intend to transform the existing social dynamics. In the field of English language education, global citizenship has a natural place. Globally, intercultural citizenship and critical citizenship approaches have been predominant. In Mexico, however, global citizenship is not a common element of English language education. This study examined the views of ten Mexican university English language teachers about global citizenship education. Specifically, the study analyzed the participants' notion of global citizen and their perception of the viability of global citizenship education in their institutional settings. Data were collected by means of a questionnaire and a responsive interview, which was analyzed with the use of the constant comparative method. Three notions of global citizen emerged from the data: informed traveler, adaptable individual, and critical thinker. None of the participants considered global citizenship education as viable in their programs and universities. The paper explores the implications of the results for teacher training efforts.

Keywords: English language teaching, intercultural citizenship education, critical citizenship education, higher education, teacher training, Mexico

Introduction

In 2013, UNESCO published a framework to promote the discussion about education for global citizenship (Tawil, 2013). The document indicates that the processes associated to globalization require a change in the traditional notion of citizenship, and that students of all kinds should be encouraged to cooperate in the solution of global problems. Global citizenship education is an attempt to introduce, into formal and non-formal education programs, issues of global concern and elements of an emerging global civic culture. The aim is to contribute to the creation of more fair, peaceful, tolerant and inclusive societies. The broad nature of global citizen education can, arguably, lead to a range of teaching approaches in a continuum that goes from the soft, minimalistic and conservative perspective that reproduces the existing social order, to more critical approaches directed to transform the existing social dynamics. In English language teaching (ELT), examples of the soft and the critical perspectives are the intercultural citizenship education (Byram, 2008), and critical citizenship education approaches (Andreotti, 2010).

The intercultural citizenship education model is based on the idea that students should be prepared to discuss common problems with citizens of other countries around the world (Alred et al., 2006; Byram, 2008). This model emphasizes the notion of criticality as the capacity to analyze and formulate reasoned arguments (Porto & Byram, 2015). To put this model into practice, teachers require training that helps them increase their own cultural awareness and intercultural competence; promote intercultural abilities of students; and change their professional identity from language teachers to intercultural communication teachers (Paricio, 2004). The intercultural model has been questioned because although it focuses on developing interpersonal attitudes and individual dispositions of students, it ignores social inequalities and power imbalances (Osler, 2015). This is thought to mask or deny the problems of injustice and discrimination that cause global problems. Without acknowledging these phenomena, it is argued, it is difficult to enable dialogue over difference.

Advocates of a critical citizenship education from a decolonial perspective (Andreotti, 2010; 2014; 2015) on the other hand, argue that global citizenship education should be discussed from different epistemologies to help students go to the roots of the problems that affect the world. To cope with the complexities, uncertainties, diversities and inequalities of globalization, teachers need other knowledges and other ways of knowing, being and relating. Educational practice must have a high level of commitment with decolonial epistemologies and social movements. It must, therefore, make evident: (1) the geopolitics of the production of knowledge, so that students "see" the knowledge of social groups that has been made invisible by dominant knowledge; (2) the development of hyper-auto-reflexivity, to avoid anchorage to "universal truths"; and (3) a pedagogical emphasis in dissent, so that students develop their capacities to understand paradoxes and tolerate complexity, ambiguity, conflict, uncertainty and difference.

The decolonial perspective on global citizenship education suggests the adoption of a critical literacy teaching approach. Critical literacy has been defined as learning to read and write in the process of becoming conscious of one's experience as historically constructed within specific power relations (Luke, 2014). Teaching critical literacy focuses on guiding students to interpret discourse in different environmental and cultural contexts. Students are encouraged to reflect on how they got to think, be, feel and act the way they do; and the implications, in local and global terms, of their beliefs about social and power relations.

Andreotti (2010, p. 13) claims that if the theme of globalization and world crisis is to be approached seriously, the levels of intellectual commitment and autonomy of the profession must be raised: "we need more lenses available to make better-informed choices of what to do in the complex and diverse settings in which we work". Romero Reyes (2013) indicates that incorporating global citizenship education into English language teaching in universities requires that teachers abandon a technical approach and go beyond teaching grammar, phonetics and vocabulary. She maintains that teachers should develop in students a critical spirit and comprehension of cultural differences to promote understanding among all human beings.

Despite the diversity of theoretical developments, in Mexico very few efforts have been made to incorporate global citizenship contents into English language

education and no information is available about the reasons for this apparent lack of interest. This study examined the perceptions of a convenience sample of English language teachers about global citizenship education. The purpose was to collect information that served in the design of a teacher training strategy on global citizenship education. The research questions were: What is the English as a foreign language (EFL) teachers' notion of a global citizen? How viable do EFL teachers believe global citizenship education is in their teaching situation? The following section will describe the methodology used to obtain the teachers' insights.

Methodology

This cross-sectional, exploratory, qualitative study was conducted to examine the views of English language teachers on global citizenship education. A non-probabilistic, intentional sample consisting of ten higher education English language teachers working for two public institutions participated voluntarily in the inquiry. Four were men and six were women. They all had more than 15 years of EFL teaching experience in higher education. Four of them had also been teacher coordinators. They all held postgraduate degrees in Education, Applied Linguistics or Social Sciences.

Data for the study were collected in two stages. In the first stage, the participants responded to a 19-item questionnaire they received by electronic mail. The items were formulated according to the criteria contained in the Education for Global Citizenship Framework for Discussion (UNESCO, 2013), and the Principles of Education for Intercultural Citizenship (Byram, 1988; 1997; 2009). The questionnaire had the purpose of situating the topic among the participants as well as collecting background information and opinions about global citizenship education.

In the second stage of the study, the teachers participated in a responsive interview (Rubin & Rubin, 2005). A responsive interview is a conversational partnership between researcher and participant which allows the researcher understand experiences of the participant by following up, deeply and extensively, on the interviewee's comments. The interviews deepened on the notions of global citizen and global citizenship education. The interviews lasted an average of 43 minutes. They were transcribed and analyzed through the constant comparative method (Glaser & Strauss, 1967). Pseudonyms were used to preserve the anonymity of the participants.

This small-scale study focused on exploring the opinions of teachers about global citizenship education, although they did not have any learning or teaching experience in the topic. They were potential participants of a world citizenship workshop. Results are meaningful only in relation to the teachers involved and are not intended to be generalized to other teachers or educational contexts.

Results

Information from the questionnaires indicated that the age of the participants ranged between 36 and 60 years. Six of them had MA studies and four had completed a PhD program. Seven of the ten informants reported that they had never heard about global citizenship education before. In relation to their notions of global

citizen, responses were categorized as: (1) an informed traveler; (2) an adaptable individual; or (3) a critical thinker. The following sections analyze these notions.

Global citizen as an informed traveler

One of the participants that more clearly expressed the notion of a global citizen as an informed traveler was Mónica. She had a PhD in International Education and was responsible of the English as a Foreign Language Department in a public polytechnic university.

A global citizen can function in any part of the world. And to be global, a person needs to speak English. A global citizen can travel to different countries without a problem, comfortably… I think a critical global citizen is the kind of person that does not conform, that changes what is wrong… The new generations should have the abilities to live in a peaceful world, and to collaborate for mutual benefit. However, at this point there are other problems in this country that deserve immediate attention, such as inequality and insecurity.

During the interview, the participant gave her views on she thought was necessary if a global citizenship education component were incorporated to her university. Her comments focused on three elements: (1) the implementation strategy; (2) the training of teachers; and (3) the teaching materials. With reference to the strategy, she stated:

We would need to teach it across the curriculum. Students take many courses, some of them lend themselves to that kind of content, emotional development and human development, for example. In those courses, students could be taught about other countries. Many are not good at geography!

In another part of the interview the participant referred to the lack of appropriate teaching materials for Global citizenship education:

We would need to have teaching materials such as videos, for example… Textbooks include global topics but not topics of strong impact, wars, nuclear problems. Serious issues never appear in textbooks. They must keep English language beautiful, I guess [smiles]. We would need more up-to-date materials.

As to the viability of offering Global citizenship education in her university, the participant was skeptical. She talked about the knowledge base and disposition of teachers. The following were her comments:

If teachers had the proper knowledge base and believed that their students should become global citizens, they would do it, but I don't think it is the case. If they were qualified, they could produce materials and discuss world topics with their students. The majority has never traveled to other countries. You feel a citizen of the world when you have traveled.

Global citizen as an adaptable individual

The participant that most clearly represented the notion of global citizen as an adaptable person was Fiona, who had a PhD in Modern Languages and experience coordinating a language teacher education program. The following were her comments:

I believe a global citizen is someone tolerant to different situations, someone who is willing to learn about those situations and to adapt to them.

Fiona considered that a critical global citizen is:

... someone capable of responding to the question: What can we do to improve tolerance and to adapt ourselves to the present-day world?

During the interview, Fiona said she considered that Global citizenship education is compatible with English as a foreign language education:

I consider that it could be a component of any language course. As a component, it could motivate students to develop as sense of common well-being, mutual tolerance and respect... Learning a language is the easiest way to teach a student to be a global citizen because learning a language is learning a different culture. If a student is competent in two languages, it means that he or she understands two cultures, and this facilitates the process of becoming a global citizen.

The participant estimated that two things were necessary to put critical global citizenship education into practice: time and teachers.

This kind of project requires the investment of a lot of time. I believe that for people to become critical global citizens, they need to be observant and reflective. Many need a lot of time to acquire reflective skills. It is not impossible to teach students to become global citizens, but it requires a lot of work and most teachers would not be willing to invest their time in it. They do not want to leave their comfort zone. The other aspect is that teachers would need to consider themselves as global citizens. They would need to be open-minded and flexible. Not all of them have critical abilities. It means saying the truth; saying what is right and what is wrong; and putting forward ideas and plans. Not all teachers are able or willing to do that. Most of them complain and complain, but they never offer suggestions or solutions to community problems.

Global citizen as a critical thinker

The critical thinker is conscious of the connection between local and global problems. This was the notion of James, a participant with a Doctorate in Social Sciences. The following comments illustrate his views on global citizenship:

A global citizen is aware of the different views about the world and is respectful of them. She is guided by inclusive principles, has a sense of justice, peace and common well-being. She is conscious of the causes of world problems.

During the interview the teacher elaborated on his point:

Global citizens know that local issues affect global issues and vice-versa. Issues such as global warming and social inequalities are strongly connected at the local and the global level. Students should be able to understand those connections and discuss possible solutions to the problems... Critical global citizens are aware that there are no universal truths, but perspectives on topics or issues. Perspectives are related to the historical and social conditions of the human beings that adopt them.

James considered that to put Global citizen education into practice, three things are needed: administrative support, teacher development, and planning. He explained his views in the following terms:

I think that it would not work as a course. It would need to be provided to students across the curriculum. When aspects such as ethical behavior and values are given as courses, for example, neither school administrators nor students take them seriously... Teachers should have deep knowledge of the contents to be taught and the strategies to teach them, and this implies professionalization. Most university teachers are not prepared to deal with global issues in class... Global citizenship education is a utopia. In times of labor uncertainty, extreme poverty, social violence,

both teachers and students are in the need of this kind of education, but paradoxically, most teachers will not have the intention to learn how to incorporate this into their classes.

The words expressed by James seem to indicate that understanding world problems and having a position on those problems is important, but not enough to educate global citizens. Truly, in addition to being well-informed citizens themselves, to develop students' knowledge, skills and values that help them engage with the world, teachers of all disciplines need to strengthen a diversity of abilities. Examples of those abilities are: creating classroom climates that are conductive to respectful dialogue; conducting discussions about controversial topics and listening non-judgmentally. Training teachers to become world citizenship educators in the context in which this study was made would need to start by understanding the reluctance of and inspiring English language teachers.

Conclusion

The notions of global citizen as informed traveler and adaptable individual seem to correspond, in some points, with the citizen fostered by the intercultural citizenship model. These notions, highly promoted by EFL textbooks, give more importance to individual attitudes and dispositions. They never refer to the social determinants of citizenship. The notion of global citizen as critical thinker concurs with some of the ideas that underpin the decolonial perspective to global citizenship. Advocates of this approach argue that teachers need other knowledges and other ways of knowing, being and relating, to cope with the complexities and uncertainties of globalization.

Results of this study show that global citizenship education was not considered workable in the universities in which the participants were teaching. The main reason given was the lack of teacher preparation. This suggests that, instead of providing given or "static" knowledge, teacher training efforts should be directed to provide spaces for teachers to engage in dialogue and focus on interrogating, interpreting and transforming their teaching conditions and circumstances, in connection to what teachers world-wide are experiencing at this point in time.

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The Dynamics of Implementing Inclusive Education in Schools

Abstract

Located within constructivist paradigm, this is a qualitative study that used a case study design. Qualitative data collection methods – interviews, observations and document analysis – were employed for this study. The sample comprised of 43 teachers and principals from four case study schools. This paper focuses on the experiences of primary school teachers regarding implementation of inclusive education. The findings from the study suggest that despite various attempts aimed at successful implementation of inclusive education in schools; not much has been achieved in this regard. The findings also suggest that there were problems emanating from the lack of sufficient training on the implementation of IE including the implementation of the SIAS (screen, identify, and support) Policy which requires teachers to screen, identify, and support learners. However, teachers were only trained to do baseline assessment and were not fully trained on SIAS. The paper recommends that there is need for teachers to get continuous training and support on the implementation of IE particularly on aspects of SIAS. Qualified educational psychologist should be utilised for the crucial role of implementing the SIAS Policy.

Keywords: implementing inclusive education, SIAS Policy, learning disability, experiences, primary schools

Introduction

Global international and national legislations have increased the focus on ideologies of inclusion and inclusive schooling, as emphasised in the UNESCO's *Salamanca Statement* (UNESCO, 1994). Inclusive education (IE), which is used as a potent mechanism to afford learners with either physical or learning impairments an opportunity to be educated, is regarded as one of the most serious issues facing developing countries.

Teachers' attitudes towards inclusive education

Campbell et al. (2003) indicate the importance of a teacher, in that teachers have the potential to either improve the quality of life of a learner with disabilities or adversely affect and even harm it. If a teacher develops and displays a negative attitude towards a learner with disabilities, the learner's quality of life can be seriously affected, sometimes for the rest of their life. When teachers are prepared to teach in an inclusive classroom attitudes towards inclusion improve; conversely, when teachers are not prepared for this instructional model, negative attitudes prevail (Jones, 2010). Teachers are principal agents in the execution of IE; therefore, it is important to enhance their skills in teaching diverse groups of learners, which include those with special educational needs (Malak, 2013). Research suggests that

the effectiveness of a teacher in terms of his/her preparedness to work with learners predicts his/her attitude and willingness to teach in inclusive contexts and is an indication that s/he holds more positive attitudes (McHatton & Parker, 2013). Furthermore, Gill (2010) argues that for inclusion-related reforms to take place and be implemented successfully, the goodwill of teachers who are at the coalface of inclusion, integration policies and policy implementation, is vital. Nel et al. (2011) contend that for learners with special needs, to be successfully included in regular classrooms, teachers in those classrooms must change their attitudes from negative to positive, as regards learners with special needs. Research studies showed that most teachers had negative feelings about inclusion due to inadequate educational facilities, like the size of the class especially in developing countries, South Africa included, leading to the conditions which are not conducive to the successful implementation of inclusive education (Cagran & Schmidt, 2011).

Teacher training and development in inclusive education

UNESCO (1994) contends that teacher training programmes are supposed to incorporate inclusion. Further, Buell et al. (1999) note that a lack of efficacy is a concerning factor for teachers who need to implement inclusive education. This is because of insufficient training and education they received on inclusion. Further, Forlin et al. (2014) posit that teacher educators are facing challenges in transforming their views and practices with respect to teacher preparation, because schools and systems are shifting towards making environments more inclusive. Allday et al. (2013) interviewed teachers who reported a paucity of inclusive training among general education teachers as part of their pre-service preparation. Allday et al. (2013) observed 10,560 teachers in their survey and found that only a quarter to a third of teachers reported having had sufficient training to carry out inclusion successfully. When South Africa's first democratic government was sworn in 1994, it had a significant impact on the education system, most especially on those learners experiencing barriers to learning. The introduction of the new constitution in 1996, which included a bill of rights, ensured that every South African's right to basic education was considered. This led to the introduction of Education White Paper 6 (hereafter referred to as EWP6): *Special Needs Education: Building an Inclusion Education and Training System* (DoE, 2001), where the main focus is on affirming that no learners, irrespective of the disabilities or barriers to learning which they face, should be denied access to equal education (Engelbrecht et al., 2006; Lebopa, 2018).

Theoretical framework – the Theory of Planned Behaviour

Underpinning this study is the Theory of Planned Behaviour (TPB), which is an extension of the theory of reasoned action (Azjen, 1991). The TPB theory is widely used to determine behaviour arising from attitudes and has been utilised in research involving attitudes towards individuals with disabilities with the aim of understanding behaviour by looking at the relationship between attitudes, subjective norms and behavioural intentions. The model suggests that attitudes toward behaviour may be influenced by past experiences, previous knowledge and newly acquired knowledge.

Problem statement: Many factors continue to affect the implementation of inclusive education in South African schools owing to the lack of training and continuous support to teachers.

Research aims: To establish the views of primary school teachers regarding the implementation of inclusive education.

Research questions: What are the views of primary school teachers regarding the implementation of inclusive education?

Methodology

This is a qualitative study located within the constructivist paradigm. To explain the challenges of full-service school's teachers better, case study design was employed, and data was gathered using various methods including observations, focus/semi-structured interviews and document reviews. These methods were deemed to be relevant in collecting qualitative data. In terms of study sample, 43 teachers and 4 principals from four schools were identified using purposive sampling, because they were already teaching in full-service schools, as that was the criteria laid down for selecting participants.

Data analysis

Approaches for qualitative data analysis were used and the process of data analysis was carried out at the same time as data collection in an iterative process. Transcription, analysis, chronological organisation of interviews as well as data exploration and reduction were done. In terms of research validly and reliability (or research quality and trustworthiness), issues relating to rigor and quality were addressed – for example, triangulation was made of data sources and research methods. Also, mixed research methods were used.

Results & Discussion

This section presents and discusses the themes that emerged from the findings and these are as below. Teachers of the four participating schools gave the feedback on the challenges they were confronted with when implementing inclusive education.

The discussed is framed according to the following themes:

- Training and development of teachers;
- Teachers' support on issues of inclusion; and
- Lack of infrastructure/resources consistent with IE.

These themes are discussed in turn in the following paragraphs.

Training and development of teachers

Throughout this study, the recurring theme was that teachers face a myriad challenge that emanate from inadequate training and insufficient development which do not address those skills that are imperative when teaching in inclusive schools. All the participants identified a strong need for intensive teacher training and ongoing development on issues concerning inclusivity. The participants in this study felt that in order for them to work confidently in IE settings and contribute positively

towards helping SEN learners, they need comprehensive training. The above view is corroborated by Mukhopadhyay et al. (2012), who mention that in their study they found that teachers complained of not receiving adequate training to manage children with special needs. The participants highlighted the areas they see as fundamental for the proper implementation of IE in their schools, and stressed the importance of proper, sufficient, intensive and relevant training and development. Participants suggested that their training should cover the following aspects:

- Lesson planning; and
- Strategies on how to screen identify and support (SIAS) learners with barriers to learning.

Lesson plan for inclusive education

The teacher participants complained about not knowing exactly how to design a lesson plan for an inclusive class due to its diversity, the fact that learners learn differently, each at a different pace, and are at different levels of development. To show that there is a need for training in this specific area, T3 from Koti Primary indicated that she desires formal training on IE, since her educational background has not prepared her to work with SEN learners. Most of the participant teachers were trained to teach and interact with learners in a mainstream school, with ordinary barriers to learning. In the absence of a well-considered lesson plan teachers are sure to leave out important components. Through document reviews, all four full-service schools' teachers presented their lesson plans which did not clearly outline pertinent strategies for dealing with barriers to learning. Also, observations suggest that there was no evidence indicating how learners with learning disabilities were accommodated in the lesson plan (Lebopa, 2018). More information to this effect may be garnered from Lebopa (2018). To show the sensitivity of this matter, another teacher, T3 said:

> Most of the challenges facing us educators are that almost all of us are not trained to work with learners who are having problems or difficulties… we are just going astray, not knowing how to help these learners.

From the review of document, it was also found that all the four schools presented lesson plans which did not clearly outline pertinent strategies for dealing with barriers to learning, nor was it evident, from the observations, how learners with learning disabilities were accommodated. Maryati & Susilowati (2015) corroborate this view, noting that preparation is a key element and vital for effective teaching and learning to take place (Lebopa, 2018).

Strategies to screen identify and support learners (SIAS)

The findings of this study borrow from Lebopa (2018). This study found that the SIAS policy requires teachers to screen identify and support learners, yet they were only able to do a baseline assessment, having not been fully trained. The study participants were of the view that qualified educational psychologists and other experts should do in-depth assessments, because their training covers a wide spectrum of learners with diverse needs. Affirming this view is one of the recommendations tabled in BRIDGE (2014), a report stating that teacher development should focus on supporting interventions aimed at SEN learners, and should include screening and identification. All these processes should be aimed at helping SEN learners achieve to the best of their abilities (Lebopa, 2018).

Teachers' support on issues of inclusion

Apart from training required, teachers also noted a need for continuous support on issues of inclusion. The participants mentioned that district officials, as representatives of the DoE, fail to provide adequate support to teachers. Even though such officials visit schools, they are mainly concerned with monitoring, rather than providing support if problems are encountered. Several cases were mentioned to strengthen their concerns, and some cases had been referred to the district officials, but such were not attended to, and some were solved but not amicably. A case in point is the post-provision model (PPM) at a primary school, where the remedial teacher must teach other classes. To date, nothing has been done about this, almost three years down the line and that affects the implementation of IE in that school. Some learners await district approval to be placed in special schools, however the district drags its feet until those learners are promoted to the next grade due to the age cohort policy, and that has a barring in the implementation of IE and puts teacher under pressure.

Contrary to the district officials, participants indicated that they were satisfied with the support they receive from parents. Parents are responsible for signing an intervention form to show that they agree that their child proceed to the next class and commit in helping children at home with schoolwork however, under a teacher's guidance. Where problems are identified on the side of the learner, parents are involved, and they respond positively by coming to school where they are updated and taught relevant skills to support the child at home. Parents were brought on board in terms of keeping them abreast of developments taking place in the school.

Lack of relevant infrastructure

By lack of relevant infrastructure, the participants meant infrastructure consistent with learners with learning disabilities. Inadequate infrastructure emerged as a main concern without which if not addressed and resolved, teachers' efforts might not be successful, even if they were passionate about practicing IE in their schools and classrooms. The response by the principal from school A supported the above statement, when saying:

> *We do have ramps, but they are not complete as they don't have rails, to protect the learner using a wheel chair not to roll over... I will not say our school is 100% user friendly and accessible because even the school yard is not entirely paved. The toilets are not adjusted for a wheelchair to can go in.*

Confirming these views, Donohue and Bornman (2014) and Chimwaza (2015) cite poor infrastructural development as one of the major factors hindering the successful implementation of IE.

Recommendations

This study has highlighted that most participants are in favour of inclusion being practiced in their schools, however, the challenges that they are facing in practicing IE will render them incompetent if not addressed by the DBE and district office. The study recommends that a coordinated and integrated approach to teacher training be effected and such training should be focused on lesson planning and strategies

required on how to screen identify and support (SIAS) learners with barriers to learning. In addition, there is need for adequate resourcing of schools for IE.

Conclusion

While teachers generally have positive attitudes to IE however, research findings suggest that there are serious challenges facing teachers from the inclusive schools due to the lack of sufficient training and support for teachers. In addition, lack of infrastructure consistent with inclusive education hampers the implementation thereof.

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Generic Competencies for Globalization from the Perspective of Engineering Students

Abstract

Within the framework of globalization, current events are diverse and heterogeneous. The General Coordination of Technological and Polytechnic Universities in Mexico (CGUTyPM) adopted a competency-based educational model with the objective of preparing professionals not only with the necessary knowledge but also with adequate skills, attitudes, and values needed in the global economy. With the aim of complementing the necessary training of future engineers, academic programs of Mexico's polytechnic universities have integrated into curricula courses in human development that address generic competencies. Development of competencies for students is complicated by the fact that within a globalized society it is necessary to learn profession-specific competencies in addition to generic competencies. However, in higher education, profession-specific competencies are commonly assumed to be of greater importance, and generic competencies are not prioritized. This paper presents the authors' research findings detailing responses from 150 students in different engineering programs. For analysis, a cross-sectional descriptive methodology was employed, using a questionnaire completed by student participants. The results show a clear need for explicit integration of the generic competencies into general curricula in particular, those of basic professional knowledge, problem-solving, commitment to ethics (honesty) and responsibility. The authors conclude that the continued teaching of the generic competencies at the university level is essential to student learning and provides students with strategies for adapting to the ever-changing environment of a labor sector situated in a globalized world.

Keywords: generic competencies, globalization, engineering students, skills, higher education

Introduction

It is time to leave behind the traditional paths of professional training and to participate in current developments in international stage in education. Higher education in Mexico is facing challenges that require a rethinking of its paradigms in teaching, learning, and evaluation due to the accelerated rate of globalization and the development of scientific knowledge, and information and communication technologies.

Standardization of professional knowledge and skills has become a challenge for educators at the international level. However, according to Delors (1996), education is not limited to the appropriation of knowledge and professional qualifications for the labor market, but rather encompasses one's general well-being, which encourages participation in social and economic life and the active development of their national character (p. 23). In this sense, the tendency that guides the educational processes is towards learning to be, to do, to know and to live together.

On the other hand, knowledge development has been exponential in recent decades (OECD, 2018) forcing the processes of learning to be throughout life, especially at higher education since knowledge can quickly become obsolete (Barrett et al., 2014). So, the basic skills of the individual should include the development of personal balance, interpersonal and relationship skills, social integration, and cognitive development, with particular attention to skills that allow learning to interpret, organize, analyze and use information.

In Mexico, education at the primary level has defined life skills (Conde, 2014, p. 32) and specific competencies for each subject and at the upper and upper secondary levels, generic and disciplinary skills are emphasized. At these levels, acting effectively in specific situations is stressed, along with flexibly and resourcefully problem-solving and relevantly adapting to context. This leads to laying the foundations of citizenship skills considered as a set of knowledge and attitudes that articulated among them, that dispose people to coexistence and peace, to democratic participation and responsibility, the appreciation and enrichment of differences within a framework of respect for human dignity, and contribution to the common good (Conde, 2014).

In a globalized world, the link between professional training and the development of generic and citizenship competencies is growing in importance. This implies an instrumental place for learning in these areas. However, a report from the Instituto Mexicano de la Juventud (2011, p. 4) noted that 18.7% of students stopped studying before reaching the age of 15, and noted that in two samples of the National Youth Survey in Mexico confirmed as a relevant cause (the second in importance) that the self-reported option "I did not like school", was selected as a reason for dropping out. One of the main problems in the development of the generic competencies is the assumption in higher education that young people are already at a sufficient level of proficiency since they have already developed at previous levels of education. The question that guided the research was: What generic competencies prepare the student for globalization?

This document presents general results of a questionnaire that was given to a group of 150 students in different engineering education programs to gauge their perceptions of the importance of generic competencies in their training as future engineers in the framework of globalization with the aim of enriching the academic processes at the Polytechnic University of Pachuca (UPP).

Generic competencies in globalization

Globalization is about the changing nature of state relations between different communities; it is a trend toward a global free flow of goods, services, capital, workforce, and information (Blackmore, 2000 cited in Reilly, 2004). Within this context, globalization includes not only cross-border flows but also a new, shared conceptualization of reality, including growth in the areas of culture and information-exchange.

In higher education, the learning process in applied sciences should be prepared so that teaching and developing generic competencies can be linked to a real employment context and the definition of skills should be socially relevant (Ruohotie, 2006).

In this sense, engineering programs focus on the development of analysis skills; consequently, those have more importance in the acquisition of skills and competencies for decision making and problem-solving. The term generic competencies has created considerable confusion in the research literature. Male (2010, p. 18) mentions that the term is used to refer to capacities that can be applied across different job and contexts.

Employers operating in global labor markets are now looking for workers who have a broad range of skills or generic competencies. Young & Chapman (2010) explain that globalization and the rapid changes that the new economy has brought also have increased levels of demand for workers. These are alternatively labeled core skills, employability skills, life skills, soft skills, workplace competencies, and critical competencies.

Perrenoud (2011) states that a competition mobilizes declarative (describing the real), procedural (prescribing the guide to be followed) and conditional (saying at what time you must begin a specific action) knowledges. Then, what distinguishes competent people in any field is not acquired knowledge but the ability to handle it strategically. The author emphasizes that the primary purpose of competences is that they function as guides for preparation and curricular development. This serves as an instrument for comparison of educational systems, conceiving education with a holistic view; hence, the curricular design in competency based education integrates three types of competencies: basic or essential, generic or transversal and specific or technical, which must be acquired, consolidated and developed in different subjects.

The concept of generic competences described by Corminas (2001) is located in personal attributes of cognitive, social, attitudinal or valued-based character that enrich professional behavior. Strictly speaking, these are not essential for professional practice; but, in practice, they become a differentiating element, adding to the human capital of a candidate for a job or toward promotion in an existing career. It can then be understood that generic competencies are identified as general skills as well.

So different perspectives have emerged concerning competencies; the argument to sustain the importance of competencies is that the subject engages in interpretation through their cognitive structure, transforms the agreed meanings from their cultural environment, and these can lead to learning, which develops first in school and then in the world of work (Gallego, 1999).

Methodology

Hernández et al. (2010) outline the application of three types of quantitative studies: exploratory, descriptive and correlational. The first is done when the objective is to examine a topic little studied. The descriptive is carried out when it is sought to specify properties, characteristics and essential features of the studied phenomenon. The correlational seeks to uncover the relation or association that exists between two or more categories or variables in a particular context.

This research utilized the descriptive method, which allowed identifying the importance of generic competencies in professional training from students' points of view. A questionnaire with 27 Likert Scale questions was designed based on the generic competencies used by the Tunning project in Latin America to gather

information from the perspective of 150 students regarding what generic competencies prepare students for globalization.

We chose a random sample of seven different engineering education programs that were studying the subject of human development "Thinking skills" because it is a subject in the second year of study, allowing use of prior subjects data from year one.

The selection of the generic competencies based on Tuning-América Latina (2007) and institutional vision was: basic knowledge of the profession, communication skills (oral and written), problem-solving, ability to organize and plan, ability to work as a team, ethical commitment (honesty), responsibility at work, ability to learn and continuously update, motivation for work, concern for quality and improvement, ability to apply knowledge to practice and motivation to achieve goals. The instrument was validated with the Alpha Cronbach test with a result of .87, implying reliability of the instrument. The Likert scale used was: (1) not important, (2) not very important, (3) moderately important, and (4) indispensable.

Results

General demographics information of the students who answered the questionnaire reflected that 81% of the students were aged 18–20, 11% aged 21–22 and 8% over the age of 23. Regarding gender: 67% of the sample were males and 33% female. The marital status of the students was: 97.9% single, and 2.1% married.

The educational programs to which the students belong were as follows: 14% financial engineering, 10% automotive mechanical engineering, 23% mechatronics engineering, 10% telematics engineering, 17% biotechnology engineering, 16% physical therapy and 10% to software engineering.

The students' birthplaces showed that 30% are from Pachuca, 55% from other municipalities in the State of Hidalgo, and 9% from other states in Mexico.

In order to identify the importance of generic competencies and improve student development, measures of central tendency were taken, where the mean of each competency ranged from moderately important (3) to indispensable (4). In the acquisition of generic competencies, the median and mode of each competency indicated that more than 60% of students felt the following were very important: acquisition of basic knowledge of profession, resolution of problems, ethical commitment (honesty) and responsibility at work.

The study also identified how students perceived the degree of strengthening of generic competences in the subjects of educational programs. It was observed in the average of each competence that high response rates are in the moderately important range (3) to indispensable (4) concerning the strengthening of competencies; this indicates more than 45% of students in the sample consider that generic competencies need to be strengthened during the classes.

Discussion

The advance of science and technology demands competent people not only in knowledge but also in values, skills, and attitudes, which are essential for the labor sector, and students themselves.

The results reaffirm contributions and statements such as Tait & Godfrey (1999), who mentioned that students must have a minimum level of generic and transferable skills when entering in higher education that allows independent and active learning. However, currently there may not be sufficient focus on such skills-training in classroom situations as expressed by 45% of the students in the sample who felt generic competencies need to be strengthened during classes. In addition, 67% of the sample was male, which could reflect male gender bias in engineering programs and a concomitant gender bias in interest for strengthening general skills training.

Moreover, with 60% of students indicating support, the findings suggest a great importance for developing generic competencies training at UPP in the classroom. The findings may also suggest a need to integrate such training in all educational programs in order to introduce student strategies for adapting to changes in daily life and the world of work in the future of a globalized world.

Here, it is important to consider Díaz (2006), who points out that generic competencies for social and personal life can also promote better citizenship. In our findings, student perspective confirmed the indispensable importance of general knowledge of profession, problem-solving, commitment to ethics (honesty) and responsibility in the general training of engineers and the development of better citizens.

Thus, three dimensions can be considered to strengthen engineers training: 1) as competences for citizenship and social life, for tolerance and communication; 2) personal competencies, such as honesty, enthusiasm, self-esteem, confidence, responsibility, initiative and perseverance; and 3) generic academic competencies that allow general access to culture, such as reading, writing, mathematical notions, mastery of basic concepts of science, technology, and foreign language proficiency (Díaz, 2006).

These suggestions present an opportunity and a challenge for institutions that train engineers. Students now must not only learn to participate in a local environment but also appreciate and benefit from cultural in a globalized context. As Barrett et al. (2014) and the Organization for Economic Co-operation and Development (OECD, 2018) suggest, education can shape the development of a global and intercultural outlook that unfolds in a lifelong process.

Conclusion

The findings reflect, from the opinion of 150 students, the importance of human development as a complement to technical training as engineers. Students consider that the generic competencies – in particular, those of acquisition of basic knowledge of the profession, problem-solving, commitment to ethics (honesty) and responsibility – are essential in engineering training programs.

In addition, students pointed out the need to strengthen the development of generic competencies in all curricula. This affirmation is a challenge for higher education, considering that students will need to develop curiosity, resilience, and self-regulation; they will need to develop respect for differing perspectives and values of others and to move forward in the face of adversity. It is essential that teachers become aware that students' motivations will be based on more than the promise of a high income and a good job; they will also care about the well-being of

their communities, the planet, and their general quality of life – including health, life satisfaction, social connections, civic engagement, education, and security (Howells, 2018).

The findings in this work allow the voice of engineering students to propose a challenge to the university. On one hand, these findings suggest a need to strengthen training in generic competencies throughout the university community, and on the other, to implement innovative educational strategies from teachers themselves. If UPP can respond to diverse and changing global contexts and to motivate students through appropriate teaching strategies, they will strengthen professional training for student well-being in general. Student development will then not simply be confined to the classroom, but will continue as a lifelong learning process in the complex and unequal world they will inherit.

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Citizenship Education in the Information Age and Educational Reform in Latin America

Abstract

The intention of the present paper is to show that people have a series of educational needs in the era of information, so that they can become competent digital citizens. These educational needs are evident in the policies promoted by the United Nations Educational, Scientific and Cultural Organisation, which were well known to Latin American governments of the decades from the 1960s to the 1990s. Therefore, it is to be hoped that the educational reforms of 1990s have elements based on the principles of education that they advanced, which emphasises the preparation of subjects in the digital era, based on advances in information and communication technology, focusing on the teaching and learning of computer science.

Keywords: citizenship, education, information, educational reforms, IBI (Intergovernmental Bureau for Informatics)

Introduction

Some explanation is needed of the idea of the information age. The explanation can take as its starting point the proposal of Hung (2009, p. 18), that present day society faces a technico-economic paradigm provided by the technological advance of computer science, telecommunications, and micro-technology, among others disciplines. These have given prominence to information and knowledge, and also given rise to a new social paradigm of society, defined by information and communication (Casassus, 1992, p. 4).

The change in the society has been so overwhelming that, at present, the most important companies in the world are in branch of computer science (Kroll & Miller, 2010, p. 7).

Hung's argument is complemented by the suggestion of Howkins et al. (1997, p. 22) who argue that the digital era corresponds to a new type of society in which human activity is transformed, affecting the way we communicate and conduct business. This change supports a tendency to treat all issues in terms of an economic approach (Castells, 1998, p. 14), where value does not reside in tangible things, but in the management and ownership of information. In addition, until the second half of the twentieth century, the majority of the population of the world lived in the

countryside (Ordorica, 2004, p. 15), which required a great amount of manpower in order to support human needs. But in the last quarter of a century this has changed dramatically, reversing the location of populations, with most people moving into cities, and fewer living in the rural areas (Ordorica, 2004, p. 16).

But the change of human beings from farmers to urban citizens has not been the end of the matter; it has radically changed our relationship with the media, and we are now, in words of Perez (2005, p. 7) "settler in the mass media". The change to being citizens of the mass media in the digital society indicates a transformation of the human species. We are living the transformation from "homo sapiens to homo mediaticus" (Perez, 2005. p. 8). Characterized as a human of the digital era, who cannot think of himself or herself without a mobile phone and a screen to connect to the world, this produces rapid changes in the fashion, among inhabitants of virtual environments, steeped in consumption (Perez, 2005. p. 9).

Digital divide is accentuated

Digital divide is accentuated in the 1980s, with great trends like neo-liberalism, globalisation, and the information society (Miñana & Rodriguez, 2002, p. 17), and the re-engineering of that same society brought about by technological development (Perez, 2005, p. 12). It is also a historical and current problem, as shown by the UNESCO digital divide (UNESCO, 2012).

In the 1970s, McLuhan had already introduced the idea of the classroom without walls, in the sense that the media had become an inexhaustible source of information, which previously had come from paper in school, and before that the church and medieval monasteries (McLuhan, 2009, p. 15).

The profound influence of the IBI (Intergovernmental Bureau for Informatics) is evident in the formulation of policies that have been adopted by Latin American countries associated with UNESCO (UNESCO, 1980, p. 5). For example, in the 1970s, the IBI financed and established two professional education centres of computer science, based in Madrid and Mexico City, which marked the beginning of that branch of study in Latin America.

Some Latin American countries

Some Latin American countries are prominent in the activities of the IBI, as in the meeting on Computer Science, Development and Peace, held in Acapulco in 1981 and the meeting on Computer Science and Sovereignty held in the city of Cali in May 1984, convened by the then president of the Republic of Colombia, Belisario Betancourt and the director of the IBI, Bernasconi.

The motto of the meeting was:

Computer science: a strategy for regional integration. The atmosphere of this meeting was dominated by the fact that the majority of the Latin American countries are passive receivers of computer science, acting as simple markets or users (Carnota, 2008, p. 9).

Also there were at this meeting denunciations on the digital divide:

Dependency implies domination. The computer science that could accelerate communication between the men, appears to be an instrument that moves towns apart from each other (Carnota, 2008, p. 11).

Quite apart from the provision of grants, the IBI was well known to the authorities in Latin American in the years before the 1970s, in which great educational reforms were organized. The white and green books on the information society were published by the European Commission in this same decade in which attention was drawn to the changed surroundings and the rise of the *Information society* (IS) as it was described. An outstanding example of this increased awareness stands out from the Green Book:

The importance of the information society (IS) is that it forces positive change, as emphasized in White Book of the Commission of 1993, Growth, competitiveness and employment (European Commission, 1996, p. 16).

Starting from the information contained in the White Book, together with the subsequent report:

Europe and the global information society, an important series of initiatives was established, with the complete endorsement of the European Council, to help form and promote the IS in Europe (European Commission, 1996, p. 18).

The report of the European Commission of 1993, published in Copenhagen, emphasises the direct role played by developments in information and communication technology (ICT) in improving the quality of life of European citizens (European Commission, 1993, p. 5).

In the body of ideas developed about the meaning of the digital era, it is to be hoped that educational reforms would be based on a thoughtful interpretation of the paradigm of what the citizen of the digital era must face. That is to say, the educational reforms of the 1990s had to be directed to prepare the citizens in the handling information and communication technology, as Collins observes:

The school cannot prepare citizens to live in the twenty first century with tools of the nineteenth century (Collins, 1997, p. 5).

With this idea as a starting point, an exploration of the educational reforms in Latin American countries can be undertaken to evaluate whether the aims of the education considered the goal of preparing citizens for the digital age.

In Argentina, Federal Law of Education No. 24195 was enacted in 1993, and Article 1 set out the general aim, which was to ensure the integration and coherence of the National System of Education (Congress of Argentina, 1995, p. 2). In Article 6, the law sets out more specific aims, including the aesthetic, ethical and religious development of the people of the country. In relation to education, it argued that:

The educational system will make possible the integral and permanent development of every man and woman, with devotion to national, regional and continental development and universal vision, so that people are recognised as having cultural and social dimensions, the ability to develop their capacities, guided by the values of life, liberty, health, the rule of law, peace, solidarity, tolerance, equality and justice (Congress of Argentina, 1995, p. 3).

As can be observed, no mention is made of computer science or technology. Only in Section (i) of Article 53 there is any indication that the relevant ministry will offer support and technical assistance to coordinate the system in the provinces and municipalities of the city of Buenos Aires.

In Bolivia, the Law of Educational Reformation was passed by the National Congress on 7 July 1994. In that law, computer science is not mentioned, but it establishes that one of the aims of Bolivian education is:

To stimulate attitudes and aptitudes towards art, science, technique and technology, promoting the capacity to face, creatively and efficiently, the challenges of local, departmental and national development (National Congress, 1994, Article 2, Section 5, p. 3).

The President of the Republic of Brazil promulgated Law No. 9394 on 20 December 1996, which established the directives and foundations for the national education system. In Article 32, Section II, it sets down that education will cover:

The understanding of the natural and social environment, of the political system, of technology, of the arts and of the values on which society is based (Presidência da Republic, 1996, p. 14).

In Chile one can find Law No. 18962, described as the Constitutional Statutory Law of Education, promulgated on 10 March 1990. In Article 13, Section (f) it establishes the intention:

To make aware of the importance of participating actively in expressions of culture related to art, science and technology, and secure harmonious physical development (Ministry of Education of Chile, 1990, p. 12).

In Colombia, in the General Law of Education, approved in 1994, the aim of education is set down in Article 5, Section 13:

To promote in the person, and in society the capacity to create, to investigate, and to adopt the technology that is required in the processes of development of the country, so that he or she is able to enter to the productive sector (Congress of the Republic of Colombia, 1994, p. 4).

In the Statutory Law of Education of the Dominican Republic, in relation to the subject in hand, it sets down in Article 99, Section (g) that the aim is:

To promote the establishment of incentives and stimuli to generate the capacity for science and technology on the part of the private sector, of the public sector, and of the educational institutions in particular (National Congress, Dominican Republic, 1997, p. 39).

In the Law on National Education of the Republic of Guatemala, by means of Legislative Decree 12-91, it establishes in Article 2, Section 5 that the aim of education is:

To drive forward education in the knowledge of science and modern technology as a means to preserve the ecological environment, or to modify it, in a planned and measured way, to the advantage of people and society (Congress of the Republic of Guatemala, 1991, p. 2).

In Law 34 of 1995 adopted by the Legislative Assembly of the Republic of Panama, in Article 9, Section 5 it establishes the aim of education as:

To stimulate development, knowledge, abilities, attitudes and habits toward research, and scientific and technological innovation, as the basis for the progress of society and the improvement of the quality of life (Legislative Assembly, Republic of Panama, 1995, p. 3).

In the Statutory Law on Education of the Republic of Venezuela, Article 27, Section 2 describes the aim as being:

To promote research into new knowledge and to push forward the progress of science, technology, letters, arts and other creative manifestations of the spirit, to the benefit and the well-being of human beings, society and the independent development of the nation (Congress of the Republic of Venezuela, 1980, p. 15).

In Law No. 127 adopted by the National House of Representatives of the Republic of Ecuador on 15 April 1983 (also known as the Law of Education), no mention is made of the subjects of computer science and technology. The same is true of the General Law of Education passed under Decree No. 917 of 1997 by the Legislative Assembly of the Republic of El Salvador, of the General Law of Education adopted by the Congress of the United States of Mexico and published on 13 July 1993 in the Official Newspaper of the Federation, of Law 23384, the General Law of Education of the Government of Peru, and of the Law of Education No. 15739 of the Republic of Uruguay.

Governmental responsibility for "information and communication technology will not promote fairness, participation or employment, unless the governments implant suitable policies" (Howkins et al., 1997, p. 15).

Despite efforts worldwide, the global gap in Internet use by men and women increased from 11% in 2013 to 12% in 2016 (UNESCO, 2017, p. 1).

Conclusion

At the conclusion of this paper, the following point can be made: Colombia and the countries of Latin American generally, experienced transformations imposed from outside in the 1980s and 1990s, as part of the project of the modernisation, evident in different fields, but especially strong in the economic and social structures, that were reflected in the educational field in the educational reforms that were implemented at that time.

Of the educational reforms in the region, only those of Colombia and the Dominican Republic consider the need to be creative in the field of technology and computer science; the others focus on the appropriation of knowhow.

In this panorama it is possible to be concluded that: The Latin American educational reforms of the 1990s, in spite of having the knowledge and of having participated in the formulation of the policies of the IBI that drew attention to the preparation of people to deal with information and communication technology, did not pay attention to those areas at all, and restricted themselves in the laws on education to the promotion of consumption. This is unlike developed countries, where education is based on the production of knowledge and technology around the information and communication technologies that are fundamental in the preparation of the citizens of the information age, to promote the advance of their countries.

In spite of the above, the historical problem of the digital divide is followed.

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Part 5

Law and Education

Elizabeth Achinewhu-Nworgu

An Overview of Nigerian Education Law and Policy: A Case Study of University Admission Policy (JAMB) and Impact on Youth Educational Development

Abstract

The purpose of this paper is to present an analysis of the context for education law and policy making in Nigeria and its implementation on youth education. The key focus is on the laws guiding educational policy, along with a case study of the university admission policy and its impact on youth education. The work was first published in the 2018 Yearbook of Education Law in Ohio. The author of this work has always had passion for the Nigerian youth education and she wishes to seek a solution to support and boost education for the youths in Nigeria, youth education seen as currently declining due to the rigor of JAMB admission. A qualitative and quantitative approach to research was employed to seek the opinions of the educators and few of the youths affected in the system. The qualitative approach provided an insight on the history of the British and American educational policies introduced in Africa, which did not meet the needs and expectations of local Nigerian communities. As such, the government of Nigeria opted to develop its own national policy as the way forward to meet the educational needs of indigenous Nigerians. Employing both the quantitative and qualitative approach enabled the analysis and conclusion that the current implementation of policies to streamline the education system in Nigeria leaves room for improvement. The fact that many Nigerian young people leave the country to study abroad reveals a high demand for education, such that the government needs to devise solutions to make university education more reachable by the youths.

Keywords: education, youths, law, policy, rules and regulations, Westernisation and impact

Introduction

Nigerian education policy dates to the nineteenth century when the British colonized the entire region of Nigeria (Achinewhu-Nworgu, 2018). The British educational policies did not favour the peculiarities of Nigeria and the aspirations of its local people; hence a truly Nigerian educational policy was established during the military era from the mid-1960s. The current national policy is the first indigenous educational policy.

The leaders in Nigeria perceived education as the key to success and national development irrespective of some economic challenges confronting African

countries, including Nigeria, this led to the government and parents to invest heavily in education of the students both at home and overseas. The rapid growth and expansion of education programmes and activities in Nigeria since its independence in 1960, demonstrates the value that the country has placed on education. This effort is not just a pastime for political leaders who are trying to attract voters, but, a genuine desire of most, if not all members of the Nigerian community to help all to acquire the necessary knowledge and skill for nation building (Achinewhu-Nworgu, 2017; 2018).

As research indicates, the need for education is much greater since twenty years into independence, research reports were showing that in spite of the economic progress made as a result of the oil industry, there was a general sense of dissatisfaction with the progress made in education and other sectors (Achinewhu-Nworgu, 2018; Brownsberger, 1983; Joseph, 1983).

The government of Nigeria has always tried to bring its educational standards in line with commendable international standards, recently initiated higher education policy reforms intended to bring its university system more in line with international good practices. The reforms promoted increased institutional autonomy, greater system differentiation, strengthened governance, and mechanisms for quality assurance. They seek to create a more flexible and responsive system of university teaching and research that, over time, will contribute increasingly to national innovation capacities, productivity gains, and economic growth (Achinewhu-Nworgu, 2018).

The purpose of this paper is to present an analysis of the context for education law and policy making in Nigeria and a discussion of their implementation. The main focus for the preceding section will be on examining the laws guiding educational policy with a case study of the university admission policy and its impact on youth education. It presents some of the comments from the participants' perspectives on education law in Nigeria and its impact on youth education. This research was originally published in the 2018 Yearbook of Education Law in Ohio as an invitation to a contributory chapter and permission was sorted to publish and present the work in the 2019 BCES Conference.

Context for education law and policy in Nigeria

Brief history of the Nigerian education system

Missionary-led education under colonialism

Western education in Nigeria started in earnest from 1900 when the British colonized the country. Missionaries were allowed to establish churches along with schools. At that time up until Nigerian amalgamation of the Northern and Southern Protectorate 1914, there were no Government guidelines for education. The missionaries mostly from United Kingdom formed the British Pattern of education (Achinewhu-Nworgu, 2018).

The administration of education by the colonial masters was through the use of certain education ordinances and education codes, such as the 1882, 1887, 1916, 1926 and 1946 Education codes (Ijaduola, 1998; Ogunu, 2000). These codes and ordinances were used as guidelines to administer education in the colony. They served as the basis for the modern day educational policies, education laws and

techniques of educational administration in Nigeria. The Macpherson Constitution of 1951 put education in a concurrent list; hence both the central and regional governments could legislate on education. This has a lot of impact on the present arrangement of the Nigerian education system. There are thirty-six state governments and the federal government in Nigeria, each of which could legislate on education (Fabunmi, 2005).

After the amalgamation and up to the Nigerian Independence (1960), the colonial Nigerian government issued guidelines that governed education in primary and secondary schools. After that period, there was no formal nursery school and nor university education patterned on the British type of education. Education was a triangle with two broad bases and an apex. The triangle accommodated everybody in the system, the very brilliant, the brilliant and not so brilliant.

There was introduction of technical and vocational education to accommodate everybody according to the person's ability. Those who reached the apex are those of the university material, who are prepared to seat for the higher school certificate or A level. Those very brilliant ones were those admitted into the university which was established at Ibadan in 1948. Other universities were established after the Nigerian Independence in 1960.

Independence, military rule and educational reform

As the colonial administrators adopted the British form of education in Nigeria, the result was an introduction of the primary, secondary, sixth form and higher education in existence to date in Nigeria. Consequent upon the attainment of independence, a system of education that did not meet the aspiration of Nigerians; hence the current 6-3-3-4 educational policy was introduced in 1977 (Fabunmi, 2005). The policy sought to introduce a functional technology-based education, which could sustain the economy.

Under the military government in the 1970s, the Nigerian government took over education from the missionaries. That action signaled the beginning of the fall in Nigerian education standard. The new education policy abolished the triangle pattern of education in Nigeria where all abilities were accommodated to that situation where everybody, struggled to reach the apex in struggling to reach which intensified competition that became deadly, people used examination malpractices and cultism to reach the apex and to be admitted into the University for Degree Programmes. The struggle to reach the apex reduced the standard of education in Nigeria. Those who reached the apex by foul and unfair means polluted the educational system as such group does did not add any value to the system, instead, malpractice continued as a norm.

New regulations, reforms and raising standards

In the 1980s, the Nigeria government abolished the A level system as a means of direct admission to the universities and established regulatory agencies to manage various levels of education. The state was delegated to manage primary schools and regulate the first primary school leaving certificates of six years duration. The West African Examination Council regulates and manages the Secondary education and sets the common external examination – West African Examination Certificate. The Teachers Registration Council regulates and manages the teachers training colleges. The polytechnic and colleges of Technology Council regulates and manages the

polygenic. The National Universities Commission (NUC) regulates and manages all Nigerian universities both public and private. The councils or boards determine the minimum standard of operations of these educational institutions and conduct accreditations from time to time. These councils, boards or commission had tremendously improved the educational standard in Nigerian education system as those programmes that are not accredited are all closed from the current system. In order to avoid closure of any programme, institutions get funding from the government or private sectors depending on whether they are public or private institutions. Private people are allowed to manage education from the primary to universities. Religious organisations are similarly allowed to own from primary to universities provided the minimum requirements are met.

Policy context: Nigeria's education system today

Nigeria has a federal system of government with 36 states and the Federal Capital Territory of Abuja. Within the states, there are 744 local governments in total. Education is administered by the federal, state and local governments. The Federal Ministry of Education is responsible for overall policy formation and ensuring quality control, but is primarily involved with tertiary education. School education is largely the responsibility of state (secondary) and local (elementary) governments. Nigeria's education system encompasses three different sectors: basic education (nine years), post-basic / senior secondary education (three years), and tertiary education (four to six years, depending on the program of study). As indicated in the Nigeria's latest National Policy on Education (2004), the modality of basic education covers nine years of formal (compulsory) schooling consisting of six years of elementary and three years of junior secondary education. Post-basic education includes three years of senior secondary education.

Basic education

The elementary education covers grades 1 through 6. As per the most recent Universal Basic Education guidelines implemented in 2014, the curriculum includes: English, mathematics, Nigerian language, basic science and technology, religion and national values, cultural and creative arts, Arabic language (optional). Pre-vocational studies (home economics, agriculture, and entrepreneurship) and French language are introduced in grade 4 (Imam, 2012).

The Nigerian national policy on education law makes it compulsory that the language of instruction for the first three years should be the "indigenous language of the child or the language of his/her immediate environment", most commonly Hausa, Ibo, or Yoruba. This policy may, however, not always be followed at schools throughout the country, and instruction may instead be delivered in English. English is commonly the language of instruction for the last three years of elementary school. Students are awarded the Primary School Leaving Certificate on completion of grade 6, based on continuous assessment.

Progression to junior secondary education is automatic and compulsory. It lasts three years and covers grades 7 through 9, completing the basic stage of education. The curriculum includes the same subjects as the elementary stage, but adds the subject of business studies.

At the end of grade 9, pupils are awarded the Basic Education Certificate (BEC), also known as Junior School Certificate, based on their performance in final

examinations administered by Nigeria's state governments. The BEC examinations take place nationwide in June each year and usually last for a week. Students are expected to take a minimum of ten subjects and a maximum of thirteen. Students must achieve passes in six subjects, including English and mathematics, to pass the Basic Education Certificate Examination (Imam, 2012).

Senior secondary education

Senior secondary education lasts for three years and covers grades 10 through to 12. In 2010, Nigeria reportedly had 7,104 secondary schools with 4,448,981 pupils and a teacher to pupil ratio of about 32:1. Reforms implemented in 2014 have led to a restructuring of the national curriculum. Students are currently required to study four compulsory "cross-cutting" core subjects, and to choose additional electives in four available areas of concentration. Compulsory subjects are: English language, mathematics, civic education, and one trade/entrepreneurship subject. The available concentration subjects are: humanities, science and mathematics, technology, and business studies. The new curriculum has a stronger focus on vocational training than previous curricula, and is intended to increase employability of high school graduates in light of high youth unemployment in Nigeria.

In addition to public schools, there are a large number of private secondary schools, most of them very expensive and located in urban centres. Many private schools include U.S. K-12, International Baccalaureate or Cambridge International Examination curricula, allowing students to take international examinations like the International General Certificate of Secondary Education (IGSCE) during their final year in high school.

Senior School Certificate Examination

At the end of grade 12 in May/June, students sit for the Senior School Certificate Examination (SSCE). They are examined in a minimum of seven and a maximum of nine subjects, including mathematics and English, which are mandatory. Successful candidates are awarded the Senior Secondary Certificate (SSC), which lists all subjects successfully taken. Students can sit for a second SSC annual exam if interested or if they need to improve on poor results in the May/June exams.

SSC examinations are offered by two different examination boards: the West African Examination Council (WAEC) and the National Examination Council (NECO). The examination is open to students currently enrolled in the final year of secondary school, as well external private candidates (in the November/December session only). The SSCE grading scale is as follows for both WAEC and NECO administered examinations. Nigerian education system extends to Vocational education and training, however, for the purposes of this chapter, more emphasis is focused on the implications of the joint admission policy and impact of the protocol on youth education (Imam, 2012).

Tertiary education

At the tertiary level, the system consists of a university sector and a non-university sector. The latter is composed of polytechnics, monotechnics, and colleges of education. The tertiary sector as a whole offers opportunities for undergraduate, graduate, and vocational and technical education (Imam, 2012).

The academic year typically runs from September to July. Most universities use a semester system of 18 – 20 weeks. Others run from January to December, divided into 3 terms of 10 –12 weeks.

University admissions

Until the 1970s, Nigerian universities set their own admissions standards. Due to the growing number of universities in Nigeria's sprawling higher education system, this practice became problematic, and, in 1978, the Nigerian government established the Joint Admissions and Matriculation Board (JAMB) to oversee a centralized admissions test called the Unified Tertiary Matriculation Examinations (UTME). The fiscal crisis of the Nigerian government has recently led to discussions about abolishing the JAMB as a cost-cutting measure. In November of 2016, the JAMB announced that it did no longer have adequate funds to effectively conduct the nation-wide UTME. Despite these financial difficulties, all public universities are presently mandated to use the governmental admissions test in their admissions decisions, even though some universities have additional requirements going beyond the UTME (Osipian, 2013).

Case study: admission to university – JAMB admission policy in Nigeria

Admission to public universities in Nigeria is very competitive and it is based on scores obtained in the Unified Tertiary Matriculation Examination as well as the SSC results. The Nigerian university education entry policy (JAMB) was examined in competing for talent and critised (Achinewhu-Nworgu, 2009) as rigorous and therefore affects the youth talents as they find it difficult to gain entry to university through the JAMB system. This is because most universities require passes in at least five SSC subjects and take in consideration to the average score. Students must score an average grade of at least 'credit' level (C6) or better to be considered for admission to public universities; some institutions may require higher grades.

It is possible to access student results through the West African Examinations Council (WAEC) or National Examination Council (NECO) websites. The student must provide the PIN number that they purchase for the equivalent of approximately USD $3 (available at banks, WAEC regional offices and online). With the PIN number it is possible to retrieve a printable copy of the WAEC results. This is the fastest and most reliable way of verifying a student's results from Nigeria (Achinewhu-Nworgu, 2018).

Methodology

A qualitative and quantitative approach to research was employed to seek the opinions of the teachers and few of the youths affected in the system. The qualitative approach provided an insight on the history of the British educational policies introduced in Africa, which did not meet the needs and expectations of local Nigerian communities. It was important for the researcher to seek the perceptions of the participants in relation to literature reviewed. The small-scale research draws on qualitative data, gathered from telephone interviews, with Nigerian 20 undergraduate students studying Law and 5 University Professors all residing in Nigeria. I originally planned to visit the participants to in their university to conduct

a face to face interview, but due to some unforeseen circumstances and costs, the plan did not materialize, hence, an alternative methodology was employed which was sufficient for the small scale research.

Implications for youth education

The participants' comments are in line with the discussions in the literature, concluding that in the past, education in Nigeria was managed by the missionaries from the Western world. Unlike today, education is now subject to general governmental guidelines for primary and secondary schooling, with examinations as discussed in the literature review. In the past, education was orderly until the military radicals in the government took control of schooling from the missionaries, thereby destroying what was seen as an efficient and effective educational system of Nigeria (Ex-VC). With the introduction of the education boards discussed above, many changes have occurred as the Nigerian educational system strives to be in line with Western norms. However, majority of the participants agreed that, laws in the Nigerian system need to be corrected through clear education laws and policies for planners and educators in Nigeria to follow (P4 – P15 agreeing to the comments). It is also accepted from five of the participants that since 1900, in the midst of the colonial era, the Nigerian government has demonstrated a significant commitment to education to keep it in line with the British and American standards (P3, P16, P18, P19, P20), eradicate illiteracy, embrace accelerated national development and to keep abreast of the advanced standards of education in Nigeria, education in Nigeria viewed as important to the development of its citizens. Yet, even as the Nigerian government seeks to improve education standards for its citizens, challenges have hampered the goal of providing quality education equally and fairly due to the educational gap between the cities, dwindling financial resources, and inadequate infrastructures. These challenges have continuing implications on the effectiveness of the Nigerian educational system, hence resulting to the nation's youth continuing to experience difficulties in gaining access to a university education.

Conclusion

This paper examined educational laws and policy formulation in Nigeria from the British colonial days to the present. The British and American educational policies introduced in Africa did not meet the needs and expectations of local Nigerian communities. This dissatisfaction resulted to the government opting to develop its own national policy as the way forward to meet the educational needs of indigenous Nigerians, mostly that of youth education.

The mini research indicates that current implementation of policies to streamline the education system in Nigeria still leaves room for improvement. As literature reviews and comments from participants, many Nigerian youths leave the country to study abroad; this obviously reveals a high demand for education, such that the government needs to review the current university admission policy (JAMB) to provide solutions to make university education more accessible for the youths and to keep them engaged in developing their career dreams.

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Academic Freedom and Strong State Control: Two Samples to Illustrate the Consequences

Abstract

In the latest BCES Conference Book (*Education in Modern Society*, BCES Conference Books, 2018) a study was published which presented Hungarian legislation on the field of education. It is clear that the legal framework serves the interests of the government. The Fundamental Law of Hungary does not guarantee the fundamental right to education but makes possible its delimitation. It secures a large playground for the majority of government and securing direct influence. One year ago, the aforementioned study asked the following question: where are these trends leading to? At that point, it seemed likely that the Hungarian government would use his power to intervene in state higher education. In the 2018 general election, the ruling party obtained an extreme majority in the parliament. It is in such a stable position that it can restrict not only the autonomy of state universities but also influences academia in general. In the spring of 2017, the world's media reacted to what is termed "Lex CEU". Although this law affected several foreign universities, it undoubtedly targeted the Central European University by creating legal requirements, which would make it impossible for this university to remain in Hungary. The other important academic issue targeted by the government, namely the abolition of Gender Studies programmes, affects one of the most respected Hungarian state universities (Eötvös Loránd University) in addition to CEU. This study presents these two cases, aims to understand the facts and legal background, and offers an analysis of the processes.

Keywords: autonomy, higher education programs, CEU, Gender Studies

Introduction

Most EU Member States' constitutions contain rules relating to academic freedom and the autonomy of HEIs. These constitutions belong to states with only a short history of democracy. This phenomenon is explainable with the bigger claim to secure the fundamental rights (see Rónay, 2018). The only constitution, which mentions these fundamental rights is the Hungarian one, not as a means of guaranteeing them but of allowing the government the possibility to delimit them. According to the literature, it has come from the hypothesis of the incompetency of academic management (Fried, 2006; Hrubos, 2015). The states as maintainer need tools which allow them to force state higher education institutions to operate more effectively. This explains the emergence of new legal institutes for the management of state universities, such as the chancellor and the consistory (Rónay, 2019). Although the Fundamental Law of Hungary makes possible the autonomy of state HEIs to be restricted, it is the basic rules that do so in general. This means that only the state universities are affected by these trends, and non-state HEIs enjoy more freedom. The difference is most noticeable when it comes to self-regulation and the management. While the Fundamental Law declares that all HEIs have the right to

regulate their organization and operations, they must do this within the framework laid down in an Act. In the case of state HEIs, the regulations are stricter; the government has the right to regulate their operational and financial matters by decree.

When these rules are discussed, another element is rarely mentioned. This is the rule, which states that the content of each higher education programme is determined by ministerial decree. It means that the government has the right to regulate which programmes are available in Hungary, which programmes the HEIs may offer and the details of these programmes. It is important to stress that this rule has been in place for a long time; it was also in the previous Act (adopted in 2005). Nevertheless, this rule previously appeared more technical than essential; previous governments never used this possibility to determine academic matters without the agreement of HEIs and the Accreditation Committee. When the government stated that it was necessary to streamline the programme structure, this made discussions possible, although the Ministry indicated which programmes it deemed unnecessary or in needs of review, and secured short deadline for the HEIs to prepare for the changes.

The first case in which the government used the aforementioned possibility was that of Gender Studies. This was not a new issue, as several representatives of the government and the governing party had already voiced their disagreement with these programmes (see YCDA's proclamation). The main (and clearly incorrect) argument was that Gender Studies theory is against the traditional family model (see the announcement of State Secretary Rétvári). Finally, the government abolished Gender Studies programmes without any discussions, ignoring the opinion of the universities, the academic community, and HEIs. Gender Studies was banned at both state and private universities. Therefore it was also abolished at the Central European University. The Fundamental Law of Hungary, however, states that the State shall have no right to decide on matters of scientific truth; only scientists shall have the right to evaluate scientific research. This decision stems from the rules of the Higher Education Act. The Act is therefore contrary to the fundamental right.

In the case of Lex CEU, the situation is more difficult. The government majority made changes, which were the subject of much criticism. Although many stressed problems with the content of the law, the circumstances in which the law was passed were more serious and clearly violated due process and the rule of law (Rónay, 2017; Bárd, 2018). The fundamental rights were infringed not only by the content of Lex CEU but also the legislative process. The Central European University tried to fulfil the requirements, but the last one was that the government must sign an agreement connecting to the operation of the university. The government refused to sign one, thereby preventing the CEU from fulfilling its obligations. In this instance, it was not the rules but the process that violated legal norms.

The abolition of Gender Studies

It is apparent that the requirement of academic freedom and the freedom of science are not separable (Vrielink, Lemmens & Parmentier, 2011). Higher Education Institutions teach the findings of the research they carry out. As the Fundamental Law of Hungary declares that only scientists have the right to take

sides to scientific questions, the government does not have the same right. Hence, the government is not allowed to regulate the content of each programme.

If we look at the various national models, it is clear that various national regulations allow the government to control the quality of education. They may differ in terms of details. However, the common solution is a three-pole process. Firstly there is the HEI, which is responsible for organising and providing the programme. This includes designing each lesson, course, etc. Secondly, there is a special agent, which can be a quality assurance body or a committee of accreditation. These bodies are independent of the HEIs and the government. In the literature, these organisations are called intermediary bodies (Neave, 1991; De Groof, Švec & Neave, 1998; Goedegebuure et al., 1994). Their defining role is to monitor the quality of content. The state then provides the framework and has overall control. The role of the government appears in several states when the intermediary body sends a report, which needs the intervention of the government (Russo, 2013).

The Hungarian model is similar to the aforementioned examples. When it comes to bachelor programmes, however, HEIs do not have the right to create programmes on their own. This is understandable because this is a means of ensuring equivalency and interoperability across HEIs. HEIs can, however, design master and doctoral programmes independently. In all cases, the Hungarian Accreditation Committee has to investigate the content of the programmes and check whether all requirements have been met. Nevertheless, in Hungary, this opinion does not need to be taken into account. The registration office does not have to ask for the opinion only of this committee; it is allowed to turn to other international quality assurance bodies.

It is not compulsory, however, for the minister to request these opinions. The minister has the right to decide to permit or not the introduction of a programme. This means that the government has more influence than in the other aforementioned countries. This solution allows decisions to be made on the future of a programme without consulting the affected institutions and bodies. The fact that the government has the possibility to abolish a programme does not mean, that the government must do it, especially without any discussion.

Moreover, although the proceeding of the government followed the law, it was unethical at the same time. Although the Accreditation Committee two years earlier supported Gender Studies and the ministerial decree contained this programme, the government changed its mind. The most disquieting and appalling element of this process is that the amending decree did not contain any official arguments. According to some unofficial explanations, there was no evidence of the programmes' effectiveness on the labour market. There are two problems with this explanation. Firstly, the government did not conduct a study to verify this. Therefore there is no evidence of this statement. Secondly, even if this statement were true, it cannot justify banning the programmes in private institutions. The state can decide not to provide funding for such programmes, but it is not within its remit to prevent a private institution from running such courses if there are students who are willing to pay. The other argument was that these programmes are in opposition to the government's family policy. This means that it was, in part at least, a clear political decision.

The 'Lex CEU'

When the government introduced the bill amending the national Higher Education Act, it was undoubtedly the new rules targeted at one body, i.e. the Central European University. The modified Act was consequently coined "Lex CEU". The fact that a legal norm targets only one person in itself breaches the requirements of the rule of law (Crăciun & Mihut, 2017). Aside from these serious problems, the circumstances under which the modified Act was accepted resulted in further violations of the rule of law. Firstly, fewer than ten days passed between introduction and promulgation (Bárd, 2018). Secondly, there was no debate. Although the Legislation Act states that public debate is compulsory, this rule can be circumvented if the parliament allows it. For instance, if it is necessary for the interest of national security or other similar reasons. It is not difficult to see that in the case of Lex CEU this was not the case and that the special process served simply to avoid debate with no basis in law (Rónay, 2017).

The aim of the Lex CEU was to ensure the quality of HEIs which qualify as foreign bodies but which do not operate educational institutions abroad. Although if these HEIs teach on programs are mostly accredited in Hungary, in the case of this part of their operation the quality insurance is realized, the institutes itself are not controlled by the Accreditation Committee, and they have the right to teach own programmes too. To obtain final permission from the authority, the foreign HEI must present the agreement signed by the two governments including the Hungarian. Since the promulgation of Lex CEU, the government has signed four agreements. Therefore four foreign HEIs fulfilled the requirements and were allowed to continue operating in Hungary. Of course, CEU has also proofed its education activity in New York State in collaboration with the Bard College (see CEU Announcement, 2017). Representatives of the Hungarian government had several meetings with the third party, but in the end, the government refused to sign the agreement without giving any official explanation.

In this case, the picture is clearer. Specialist legal knowledge is not required to see that it was not the CEU that did not fulfil the requirements of the Act. The government violated the Act which it introduced. Under the rule of law, it is an elementary obligation for everyone to follow the law. This also means if one party is not able to comply, it should notify the other party as soon as possible.

Conclusion

It is clear that the government is responsible for providing public services, including higher education. On the one hand, the government, as a maintainer has a role in financing state institutions. To fulfil this requirement, the government has the right to supervise the efficiency of HEIs. On the other hand, the government is responsible for the quality of higher education. If the level of quality is low at HEIs, the diplomas become worthless, and former students' positions on the labour market become weaker. Therefore, it is obvious that rules are needed and that the government needs to be able to regulate and control the processes. However, when this is not the responsibility of the government anymore, it becomes slippery.

As outlined above, the Hungarian regulations give increased power to the government. Although the Fundamental Law of Hungary allows for the delimitation

of some fundamental rights, including therefore the fundamental rights related to education, it would be not definitely necessary to fill this space. As illustrated, both the parliament and the government did not only fill the space but many time stepped over the line.

The Higher Education Act, which allows the government to create rules, which violate academic freedom and the freedom of science clearly violates the Fundamental Law of Hungary. Moreover, in relation to the abolition of Gender Studies programmes, the government did not give any clear explanations. No assessment of these programmes was carried out. The last evaluation did not find any problems. It is clear that it was the content of these programmes which bothered the government. Some stated that Gender Studies programmes are not scientific. The government accepted this opinion and gave a statement in scientific matters. This is an obvious breach of the Fundamental Law of Hungary,

The situation with regard to CEU is more serious. Namely, here the government and the government majority in parliament not only created an Act which violates its own rules but violated the rules of the latter. When the government simply does not sign the necessary agreement, it proves that it is not even attempting to abide by the law.

One year ago, people were wondering whether after the restriction of the management and financial operations of state HEIs education and research would also be restricted, thereby leading to the elimination of freedom or autonomy. One year later the government, without hesitation, stepped forward, abolished a programme and prevented another university from operating. The government did that in both cases without justification and for clear political interests. Many of us can remember similar phenomena or recognize similar processes in other countries. Many are therefore concerned that this is taking Hungary on a path towards the darkest of destinations.

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Deepening Citizens' Right and Access to Competitive Higher Education in Nigeria: Research-informed Teaching in Perspective

Abstract

International law obligates States to recognize the right of citizens to education and that they should make higher education accessible to all on the basis of capacity. This obligation reinforces the significant place of education in shaping and transforming the community. Education can redefine economic, cultural and social connections. However, the right to higher education in a globalised world goes beyond merely creating access to education; it entails providing a competitive one that meets the challenges of the 21st century. This is, therefore, a necessary ingredient to fulfilling this obligation of States. That is, a State's failure to meet this obligation is a deprivation of their citizens' right to higher education. Forward-minded countries have progressively adopted measures to deepen the access of their citizens to cutting-edge higher education. At the heart of this is a strategic shift from traditional educational delivery approaches to research-informed teaching – the practice of integrating research with teaching in higher education. But Nigeria, just like other developing countries, have not entrenched research-informed teaching within their higher education system and this has impeded the attainment of competitive higher education in the country. The paper examines the issue of research-informed teaching and its impact on Nigerian citizen's right and access to competitive higher education. The work employs qualitative research method to sample the views of participants on the chosen topic. The paper suggests that Nigeria should strategically incorporate research-informed teaching to deepen her citizens' right and access to competitive higher education.

Keywords: citizens' right, human right, access, competitive higher education, research-informed teaching

Introduction

Across the world, advanced States are continuously seeking measures to deepen the standard of education in their countries to ensure that their citizens enjoy meaningful access to education. This illustrates their keen awareness of the responsibility that attends their obligation under international law to recognize the rights of their citizens to education (Universal Declaration of Human Rights, 1948). It is becoming increasingly accepted that the right to education entails access to competitive higher education that aligns with the demands of today's knowledge-based economy.

Approaches such as research-informed teaching are being employed by universities to strengthen the standard of higher education, the world over. These methods are proven to enhance students' capacity and employability. However, in developing countries such as Nigeria, they have not been very proactive, either in creating unique models that suit their local circumstances or successfully adopting

the workable templates of the advanced countries. Through evaluation of both primary and secondary data, interview of co-lecturers and the personal experiences of the authors, it is observed that research-informed teaching still does not form the core of Nigerian universities curricula.

The aim of this paper therefore is to evaluate the effectiveness of the current approach to delivering higher education in Nigeria in relation to research-informed teaching. It assesses how Nigeria can depart from the lackluster status quo and improve its system through the development and adoption of transformative higher education teaching and research methods. The paper suggests that Nigeria should strategically incorporate research-informed teaching to deepen her citizens' right and access to competitive higher education.

Understanding the nature of the right to higher education

International law, over the years, has consistently taken concerted steps to promote and protect the right of citizens to education. This is in recognition of the integral place of education to both national and international development. International law clearly recognizes the right to education as a human right of every one across the globe. According to Article 26 (1) of the Universal Declaration of Human Rights (1948), "Everyone has the right to education".

The United Nations Convention on the Rights of the Child (1989), on its part, goes further to uphold the right of citizens to higher education. Article 28 of the Convention specifically requires States to:

Recognise the right of the child to education and with a view to achieving this right progressively and on the basis of equal opportunity, and to…:

(c) Make higher education accessible to all on the basis of capacity.

The global concern about promoting the right of citizens to education is hinged on the principle of best interest of the citizen and the State (Emejuru & Amadi, 2014, p. 8). No doubt, an educationally empowered citizen is in a better position to utilize his talent and potential for the betterment of the State.

Seeing the right to education as a human right is apposite because human rights are taken as legally enforceable claims against both the State and/or other persons. Human Rights are those rights which are so fundamental and form part of human existence without which life will be meaningless. These rights are fundamental and basic to the individual or group of individuals who assert them (Foster, 2008, pp. 5-7). Such rights are regarded as inalienable and fundamental to enjoyment of life and full human expression (Emejuru & Amadi, 2014, p. 8). They include the right to life, the right to property, right to fair hearing, freedom of expression, right to safe environment etc.

Human right upholds the basic dignity of the citizen as a human being, making him deserving of humane treatment (Emejuru & Amadi, 2014, p. 8). Although it cannot be argued that without right to education, life will be completely meaningless. But what can be said is that with full access to education by every citizen, and a competitive higher education at that, the right to life itself and other enshrined rights will find greater meaning, expression and utility. So the right to competitive higher education is rightly taken as forming a main component of human rights.

The universal declaration on human rights provides a universally agreed platform and standards to gauge each State's commitment to the respect and protection of the rights of their citizens. At the national level, globally acceptable standards of human rights have been incorporated into the *corpus juris* of most States, riding on the protocols and directive principles of international law (Steiner & Alston, 2007, p. 23). This reflects the commitment of national governments to respect and protect the rights of their citizens. In Nigeria, the fundamental human rights of Nigerians are enshrined in Chapter 4 of Nigeria's Constitution (1999, as amended).

The constitution is supreme; it is the *grundnorm* and it places premium on the human rights of Nigerian citizens. The mechanisms for upholding these rights are placed within the framework of the rule of law and respect for the right of individuals. Although the Nigerian constitution does not specifically outline the right to education as a human right, however, it can be stated that the country is bound by international Convention and Protocols to which it is a signatory. Therefore, the rights protected by those instruments are enforceable at the instance of citizens, in line with established procedures under international law.

Nevertheless, recognizing the significance of education both to the citizen and the State, Chapter 2 of the Nigerian Constitution (1999, as amended) which deals with fundamental objectives and directive principles of State policy, in section 18 states:

(1) *Government shall direct its policy towards ensuring that there are equal and adequate educational opportunities at all levels*
(2) *Government shall promote science and technology*
(3) *Government shall strive to eradicate illiteracy; and to this end Government shall as and when practicable provide*
    (a) *Free, compulsory and universal primary education;*
    (b) *Free secondary education;*
    (c) *Free university education; and*
    (d) *Free adult literacy programme.*

It should be emphasized, however, that the right to higher education in a globalised world goes beyond merely creating access to education by States. It entails creating access to competitive and globalised education that can withstand the challenges of the 21st century. In other words, the non-provision of a competitive higher education by a State is a deprivation of the right of its citizens because anything short of quality education that enables citizen to compete globally does not amount to much. This lack of competitive education has been the situation of citizens of developing countries like Nigeria.

As a progressive step, the Nigerian State, without attempting to re-invent the wheel, can adopt measures already developed and entrenched by the forward-thinking States to deepen access to cutting-edge higher education in their countries, although tweaking it to suit its local circumstance. At the heart of measures adopted by progressive States across the world is a strategic shift from traditional educational delivery approaches to research-informed teaching.

What research informed teaching entails

Research-informed teaching is the practice whereby research is streamlined with teaching in higher education (Griffith, 2004; Healey, 2005). The concept is also

referred to as research-based practice in higher education or teaching as research (see University of North Carolina, 2019). The motivation behind the argument for research-informed teaching is the importance of mainstreaming the relationship between research and teaching; that is to promote closer links between the two to enhance best practices in teaching (Burgum & Stoakes, 2019). According to Brew (2001), "research-informed teaching is not just about pedagogic research or research into higher education; it is about the complex interplay of the core activities of higher education linked by their mutual relationships of learning".

The traditional practice globally is that most universities are organized into research and teaching divisions. Lecturers are then recruited to undertake both, whereas the course content revolves around the teacher's interest. But research-informed teaching seeks to further integrate both teaching and research, and making the student not only the focus but an integral part of the whole teaching process.

However, there appears to be no consensus as to what research-informed teaching actually entails, in terms of definition, and how it should be developed and delivered. It is argued that research-informed teaching is a "rather broad, all-encompassing term which covers a very diverse range of techniques" (Nicholson, 2017, p. 3). What can be said, however, is that there is a consensus on the overall aim of research-informed teaching to forge a closer link between teaching and research?

In recent times, there has been significant investment in developing research-informed teaching as the rightful alternative approach to enhancing competitive higher education outcomes such as student capacity and employability, staff awareness and institutions acceptability. In 2016, the UK government invested 26 million pounds into universities across the UK to reinforce research-informed teaching (Graham-Matheson, 2010).

Research-informed teaching could be achieved through various forms. The combined works of Griffith (2004), Healey (2005), and later, Healey and Jenkins (2014), highlight four distinct approaches to teaching that are generally taken as forming research-informed teaching (see also Centre for Teaching Excellence, 2019). These approaches are:

- Research-led teaching – This is primarily based on the traditional information transmission model where the faculty member simply shares the research outcome with students. Here, students are taught research findings in their field of study;
- Research-oriented teaching – The course content goes as far as highlighting the processes by which knowledge is produced. This way students learn the research processes as well as methodologies;
- Research-based teaching – This method helps students to learn as researchers. The course content is designed around inquiry-based, problem-based and project-based activities. It reduces the division between the teacher and students; and
- Research-tutored teaching – This method designs course content in a way that enable students to learn in small group discussions with the teacher dissecting research findings, and students writing papers or essays. Students learn through critique and discussion between themselves and staff.

Research-led and research-oriented methods are considered to be teacher-focused and that it emphasizes information dissemination; while research-based and research-tutored approaches are taken as student-focused; that it enhances students learning by doing (Nicholson, 2017, p. 3).

Nicholson (2017) and Healey (2005) emphasize the need to develop student-centered approaches to enhance students' employability. Nicholson (2017, p. 3) stated that "The most effective research-informed teaching methods must surely be those which best equip students with skills, understandings (or knowledge) and personal attributes that will make them more likely to gain employment and be successful in their profession". But it should be emphasized that the student cannot be empowered without heavy reliance on the subject knowledge of the teacher.

Therefore a combination of the four methods appear to offer the best learning outcomes, although they are most effective when tailored to the need of the particular discipline. The interest of the student should be the paramount yardstick of measurement because any approach that does not enhance students' employability could be considered not effective enough.

Accordingly, employability should be at the heart of Nigeria's higher educational system to enhance the quality of its products. There is the urgent need to upscale Nigeria's higher education to a global level through established approaches such as research-informed teaching. This is the better means by which the country can enhance the citizens' rights and access to competitive higher education.

Research methodology

The paper adopts a doctrinal and analytical approach, relying on qualitative and systematic investigation of primary and secondary data. It incorporates the personal experiences of the authors and co-lecturers at Nigerian universities which revealed that research-informed teaching approach has either not yet been introduced or deeply entrenched within the system. A questionnaire was administered and sample opinion taken. This is by no means conclusive, but it provides a fair idea of what is currently obtainable in Nigeria's higher educational system as regards research-informed teaching.

Analysis of research findings

From our study and the responses from the administered questionnaire, it is revealed that research-informed teaching approach has either not yet been introduced or deeply entrenched within Nigeria's higher education system. The responses confirm that structured, core research work only seems to take place during students' final year project, instead of advanced integration of research and teaching from first year to final year. This causes students grave difficulty seeing that they are only introduced to research in their final year. It is also observed that the course content that are given by the universities to lecturers are not always comprehensive as is obtainable in developed countries. Teaching is primarily carried out by way of information dissemination. Students are given assignments and essays, but these are not eminently structured and adequately supervised within determined research-informed teaching framework.

Benefits of research-informed teaching

From case studies conducted by several institutions, it has been discovered that research-informed teaching holds significant benefits in many respects for students, staff and higher institutions as a whole (Centre for Teaching Excellence, 2019). These benefits include:

- Better engagement and student satisfaction with the course
- Intellectual curiosity
- Students as learners and independent thinkers
- Research and communication skills
- Employability

In highlighting the diverse influences of research-informed teaching, case studies conducted by the University of Portsmouth and Nottingham Trent University assert that teaching students as co-researchers helps students' engagement within and beyond the formal curriculum, advancing knowledge and understanding, and on occasion contributing to the wider discipline (Walkington, 2015).

Research-informed teaching approach emphasizes focus on curriculum design, where students learn together with staff through joint activities and projects, and are supported by structured interventions throughout their course, from year one to final year project.

Considering the high competition in the labour market, employability skills are relevant and the totality of research based learning increases the employability of students as it enhances the skill of formulating questions, processing and monitoring research process which results in critical thinking and communication skills. It also fosters engagement which promotes team work and analytical skills. Students are able to use their initiative, self-manage themselves and sharpen their problem solving skills. All these skills are beneficial in the work place and so employers are on the lookout for them during recruitment processes.

Challenges

Despite the highlighted positive impacts and influences of research-informed teaching, the path to integrating it into the teaching system is riddled with challenges at various levels. A major challenge occurs where the faculty and institution do not provide the necessary support to drive the process. It is very difficult to succeed on a programme where the expected key drivers of the process do not fully buy into the concept, maybe through lack of appreciating what it entails.

Also, the number and diversity of students necessitating flexibility and adaptability poses another challenge (Burgum & Stoakes, 2019). This is particularly the case of Nigeria where the student-teacher ratio is very high. A situation where an average class in a public university could range above 100, overseeing a seamless integration of research-informed teaching could be daunting.

Then there is the problem of staff perceptions of their role and practicability of research-informed teaching. It could be quite confusing for staff to fully grasp what their role in the process entails because research-informed teaching disrupts the traditional process where research primarily flows from the research interest and prowess of the teacher.

Conclusion and recommendation

This paper examined the right and access of Nigerian citizens to competitive higher education and how it can be achieved through research-informed teaching. It argues that the right to education as guaranteed under international law is only truly enjoyed where citizens have access to competitive higher education that meets the challenges of a globalised world; it contends that, anything less amounts to a deprivation of the rights of citizens. It looked at how advanced countries are deepening the quality of their education through research-informed teaching to meet their educational objectives.

Having confirmed that research informed-teaching is not yet introduced as part, or forming the core, of Nigeria's higher education teaching approach, it is recommended that core research should be introduced from the first year of study instead of waiting to introduce students to research for the first time during their final year project. This will reduce the grave difficulty caused to students when they only encounter core research in their final year.

It is also recommended, in respect of legal education, that the Council of Legal Education, which is the supervisory body for legal training in Nigeria, should establish a Centre for Teaching Excellence to develop and coordinate research-informed teaching across law Faculties in Nigeria. This could be replicated by other professional bodies. It is believed that the cumulative effect of these measures will significantly impact on the employability of Nigerian students as well as enhance national development.

Acknowledgements

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Challenges of Combining Roles as an Educator and Entrepreneur: A Reflective Experience on Professional Development

Abstract

The purpose of this paper is to analyse the experience and challenges faced by female in multi-tasking, combing full-time academic work with being an entrepreneur; the impact on professional practice and personal development. Becoming an entrepreneur can be a challenging and daunting task, but it can also come with good experience in managing own small businesses and putting theory into practice in teaching students. The work draws on experiences of how entrepreneurs were able to combine academic work with managing their own small businesses and challenges confronted in realities. Drawing from experience, moving back and forth between the academic and business spheres, this paper considers the impact of being an entrepreneur and lecturer, and what it meant for the students, institutions and own professional development. The work uses qualitative and quantitative research paradigms to seek the perceptions of some professionals who were able to combine academic work and being an entrepreneur, challenges faced in the combined roles on their students, institution and professional development. The analysis of findings from few concludes that there are many benefits, as well as challenges, confronting professionals in multi-tasking of being a business owner and academic Lecturer, of which, most of them became very successful through hard work and determination and some failed to cope due to combination of two ultimately complementary roles. This presents further areas for research to investigate why some professionals who try to combine job roles of academic and being a business owner fail and if this may be the case for the male teachers.

Keywords: educator, entrepreneur, professional development, female

Introduction

The journey of combining job roles as a female academic professional and an entrepreneur is worth reflecting. The journey to a career aspiration is all about determination and how to juggle the roles. As stated in *Determine to succeed* by Achinewhu-Nworgu (2014, p. 1), there have been more opportunities available to individuals to progress in education, to make a good career for themselves and to enjoy a fulfilling family and personal life. These opportunities must be explored and utilised in one way or the other. However, in every available opportunity, there are challenges that come with it. We truly live in an age of opportunity but successfully realising one's aspirations is never easy (Achinewhu-Nworgu, 2014, p. 1). The ambition to combine job roles of being in academy and also a business owner can confront us with challenges and benefits. The experience of being an entrepreneur and a lecturer is worth sharing to encourage the women with this ambitious career or wanting to be in it to realise that the journey is worth pursuing but, it comes with

challenges and hurdles that can put a barrier to success. The most important is the ambition and determination to persevere in any business that interests you in developing a career. The paper will present a contextual analysis of the meaning of entrepreneurship, factors that present challenges and benefits in relation to female perceptions of their personal experiences in multi-role as entrepreneur and Teacher.

Context

There are some good ample body of literature that explored various definitions and reasons why people choose to become an entrepreneur, however, most of the literature have not specifically examined why some professionals in education combine full time jobs and also being a business owner, benefits and challenges faced in the combined roles. To address the issue of entrepreneurship, it is important to first, examine some of the definitions provided in the literature of which Cooper and Dundleberg (1987) defined entrepreneur as a person who either own or manage a business. According to Knight (1921), an entrepreneur is considered as a bearer for risks and uncertainties in making business choices, and make innovations for new goods, new methods of production, new markets, and new types of industrial organization. McClelland (1961) confirms an entrepreneur as a business manager who has the responsibility as a decision maker and takes responsibility for the decision made in the business. Others have described entrepreneurship as a career of the students in business start-up for a career development. Schumpeter (1934) stated that entrepreneur has long history of being recognised as important economic sector to local, regional and national levels. In addition, some people decide to work for themselves because of the poor treatment and poor relationship with employers or line manager, the choice of becoming own boss becomes a priority, particularly for those who may not be in good terms with colleagues or line managers may choose to work for themselves for respect deserved. Along the road, may decide to be in partnership, associates or even clients (ibid). The choice of entrepreneurship is about whom you are and what you really want to prove to the world around you, maybe to become a millionaire, to develop own skill and target in business or to own your business. To some, it could be because of being the main bread winner of the family, hence the choice to have own business for steady income, work at own time and pace, particularly in a situation of high unemployment, the fear of being unemployed therefore, becoming an entrepreneur gives you some job security.

The economic development of any nation solely relies upon both men and women entrepreneurs who play important roles in development of countries. Research indicates that women entrepreneurs are playing an important role in most developed countries and also some developing countries (Brush, 1992). However, the number of women entrepreneurs' participation is still relatively small compared to men-owned businesses (Minniti & Arenius, 2003 in Idris & Tan, 2017). Female entrepreneurs like Oprah Winfrey, Rhonda Byrone for example have already proved the concept that these women are not only recognized as the house makers but also as an entrepreneur. The assumption that 21st century women can equally be equipped to face the challenges in their personal as well as their professional life indicates the perception held about women in business. Most female academic entrepreneurs do it to impact the lives of young people and to give their students the practical experience of what it takes to be in the business world. Most women who become

entrepreneurs these days are also educators from personal experience of combing teaching and own business which helps to create positive impact on their students, teaching from practical experience. However, the fact still remains that most female entrepreneurs are mostly confronted with more challenges than their male counter parts hearing from the horse's mouth and from personal experiences, although this is subject to further debate and future research.

The mini research has focused on the gap in literature as presented below on factors, challenges and benefits experienced by the female participants in their combined roles of full time teaching and being an entrepreneur, impact on their students, institutions and personal development.

Methodology

As stated above, the main purpose of this paper was to explore literature and research around challenges confronting professionals (Teachers) who tend to combine their job roles as teachers and also business owners. It was important to speak to some of the participants in person and on phone to find out how they perceived their roles in combing two busy jobs, impact on their students, institutions and personal development; also sharing personal experience in similar situation. A combination of qualitative and quantitative research paradigms was employed to seek the perceptions of some professionals who were able to combine academic work and being an entrepreneur, challenges faced in the combined roles on their students, institution and professional development were gathered and analysed. A combined approach to research was very important in generating reach data that informed opinion and to reach a conclusion. The planned use of two or more different data collection techniques was very important to achieve good result and compare findings. In some cases, the integration of different methods within a single framework and set of priorities specified within the overall research design helps to capture rich data. The value of combining methods is that it allows for the triangulation of data (Punch, 2005), recognises the similarities between qualitative and quantitative approaches (Blaxter et al., 2001), is less constraining than relying upon a single method (Morse, 2003, p. 195) and, crucially, strengthens the findings that are produced, hence the initial exploration of literature provided us with first-hand information coupled with the face to face and telephone interviews, including personal experience and observations helped to provide the analysis and the comments from the participants labelled as (E) for confidentiality, in line to ethical compliance and obligations. The findings are analysed with linked literature and comments from some of the participants as headed below.

Participants' comments and analyses of findings

Factors that promote female academic entrepreneurship

Personal factors

There are factors that present challenges, determinants and barriers to women in their choice of combining business with academic roles. Personal circumstances such as income stability in the family as some women are the main bread winner of their families; they face challenges along with the ambition and aspirations to

succeed in the career. To overcome these challenges women need to become active academic entrepreneurs which they can have flexibility as well as feasibility. From a personal experience, the urge to combine academic roles as well as being a business owner was an ambition from a young age and teaching career in business subjects, as well as family. Putting theory into practice of teaching was a major urge to be in the field of combing both tasks. This was also applicable to some of the participants interviewed:

> *The desire to accomplish my career goal was a motive behind having a hair dressing saloon and being a teacher, it comes with challenges and hard work, but rewarding on the long run.* (E2)

Organizational factors

There is a stereotype that indicates that female entrepreneurs lack leadership or managerial decision making ability. Women are perceived by the society as emotional rather than logical and subject to show their emotions. It is obvious that female entrepreneurs face organisational turbulence particularly in the field of partnership with other organisations which can hider decision to offer contracts. Another participant affirmed this with her statement:

> *One of the main challenges I faced as an entrepreneur was getting contracts renewed, I worked so hard to impress my partners, even when they are at fault, I had to comply with their specifications, the most interesting, my male counter parts had more access than me. However, I never gave up, but persevered and today, I can proudly say that it has made a great impact in my career development, putting theory into practice in the classroom.* (E4)

Societal factors

The stereotypes or the traditions of the society or community have impact on women entrepreneurs, hence a big deterrent. The stereotyping, negative perceptions of the society and community can have impact on female entrepreneurs, particularly coming from the ethnic minority group; can hinder success in the business.

> *The experience of one of us as an entrepreneur was the fact that being a woman from black minority group was a big challenge faced, with some customers being biased in a community dominated by different race to see a black woman in a successful business, more so, multi-tasking. First impression was that, the business will not survive being run by a black woman, but perception changed when people realised that She was a big asset and can make a big change to the community as an entrepreneur, therefore stereotyping is a killer to entrepreneurship business and has led to failures.* (E6)

Women academic entrepreneurs and their rewards

Financial freedom and multiple revenue

Female entrepreneurs are confronted with problems of accessing finance from experience, hence limiting the business growth, expansion and in most cases failure. As a result, women entrepreneurs are more cautious about having a financial stability and do not want to invest their time and money in an unprofitable business. Therefore, the economic conditions of a family may not be stable and in most cases, one income may not be sufficient enough in most families with children or other financial commitments.

It is obvious that most women entrepreneurs will use higher education or any education as a platform to plethora their source of income and also receive the stability required to sustain the demand of the family. Experience affirms the above, as an entrepreneur, the fear of unknown and financial instability in some cases, could result in combing job roles to sustain the business and cope with family financial demands. (E7)

Non-traditional student cohort

Most female entrepreneurs aspire for their own business due to the demands and the need to increase the non-traditional students, hence, the need for more rapidly partnership among universities and industries to tackle a huge number of major challenges faced by in the global world. The need for academic entrepreneur is also increasing especially the women academic entrepreneurs. Women academic entrepreneurs promote and cultivate the entrepreneurial culture among the non-traditional students to encourage them to become successful entrepreneur, hence leading to more and more professional women becoming entrepreneurs. In addition, most academic female entrepreneurs have realised the benefits of linking their practical experience to the benefits of their students.

I share my practical experience with my students particularly in one of my modules which require students to carry out a research on challenges facing their chosen profession or career, also those wanting to have their own business after their studies. Sharing what it takes to run a business from practical experience gives them the first-hand knowledge. (E8)

Change agents

Most women entrepreneurs in academia can act as a catalyst to bringing the desired changes in education institution as well as the students who aspire to become an entrepreneur. Women academic entrepreneurs can become an entrepreneur within the education system to enhance the employability skills of the students and more so, most of the modules require input on employability skill. As stated by one of the participants:

Developing myself for the practice of business and putting theory into practice to educate my students gave me the motivation to combine teaching career and being an entrepreneurs. Useful experience to share with students and colleagues, but hard to work and not easy to do it all, hence I gave up and sold my business. (E10)

Innovation

Innovation is one of the key characteristics for any entrepreneurs to develop their business through organic or inorganic growth particularly in the fast growing world of innovation and It advancement which everyone business needs to embrace. Innovation plays a pivotal role in the field of education, entrepreneurship and environment. Academic women entrepreneurs laid a foundation by promoting innovative teaching practices based on their experience as an educator as well as an entrepreneur. Being a female entrepreneur obviously is prone to risks and this is evidenced by personal experience, however most of the participants interviewed are ready to take calculative risks, and also identified new way of teaching or new way of promoting entrepreneurship among the students as well as in the society. Women

are ready to act as knowledge brokers by passing the information from generation to generation, as commented by one of the participants:

> *I love my teaching job, but I combined it with looking after my late parents' business that I inherited. Father, before passing on, insisted that the business remains the property of the family generation that geared to innovation and passing on the practical experience to younger generation. This is what has kept me combing teaching and being a business owner; however, it requires good time, good leadership and motivation.* (E12)

Enhanced working conditions

Women entrepreneurs are in a position to seek better working conditions when compared to the male entrepreneurs as they already have an improved working conditions as evidence from the comments from the participants. Most women left their full time jobs or their business to ensure they have stable income at the same time they have better working conditions which they never had before and this is confirmed by one the participants. Women in their profession were not given a priority to receive a first class pay check or better working hours, though they have been given an opportunity for flexi-working. Most corporate organisations permit their male members to travel in a first class or work from home options, however it is still a question mark for women in their early profession. By becoming an academic entrepreneur they are able to balance their life. This will enhance the quality of their life and also able to support their children (Kariv, 2013).

> *As commented, I combined business and my academic work to have freedom and work balance which I enjoy being my own Boss, good for my career, practical experience to share with my students and at the end of it, value added to my organisational goals.* (E14)

Conclusion

The paper presents key challenges faced by female professional entrepreneurs who combine their teaching roles with being entrepreneurs. Some teachers derive joy and benefits in having their personal businesses and education roles, which they are confronted with by circumstances and factors discussed above. It is obvious from discussion that most of the participants in this research that combine job roles do that to enhance their careers, make more money or be their own boss. However, most of them have found the job daunting as it seem more difficult for the female entrepreneurs combing full time teaching with owing a business, hence some drop out and some perceiver to the end. Others have also gained good experience and skills to enhance their students' experience of the nature of the industries and challenges faced by entrepreneurs. In return, students have developed practical experience, theoretical skill and knowledge and in return, value added to the organisation and personal development. We therefore realised from the research that it is possible to combine being an entrepreneur and a teacher and to achieve this; one has to be determined to persevere with motivation. The work is on its early stage. The findings present the group with areas for further research to explore how male teachers who combine teaching with personal business perceive the challenges an area for future investigation. This presents further areas for research to further

investigate why some professionals fail in trying to combine job roles of being in academy and business owner, also to extend the work to male teachers' views.

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Supporting Culturally Diverse Early Childhood Centres in South African Townships

Abstract

This paper explores how early childhood (EC) leaders in South Africa support the EC centres in the townships of Gauteng Province. The term township refers to underdeveloped and racially segregated urban areas reserved for black communities, specifically Coloured, Africans and Indians. The townships are usually built outside the cities and towns. The term (township) also has a discrete legal implication in South Africa's system of land title, which carries no tribal connotations.
Gauteng Province is one of the nine provinces of South Africa. It is the economic hub of the country and consists of people from diverse cultural backgrounds. The purpose of this paper is to understand the support practices by EC leaders through providing insight into the subjective experiences of practitioners. In this paper, support means empowering practitioners. This paper followed the qualitative approach in exploring how EC leaders support practitioners in a diverse cultural milieu. The paradigm used is interpretive because the author interpreted the support mechanisms offered. Data was collected through literature review. The paper contends that knowledge and understanding of diverse cultures is significance in giving support to culturally diverse EC centres. The expectation is that EC leaders should have the skill and ability to support practitioners in any given context. Findings reveal that good support can happen when there is collaboration between principals, practitioners and communities.

Keywords: cultural diversity, township, support, practitioners, EC centre, leadership, race

Introduction

South Africa (SA) is a multicultural society evolving from a segregated past where diversity was never tolerated, let alone celebrated. The dawn of democracy in South Africa only began in 1993 as an interim constitution drafted by various political formations, and had its first democratic elections in 1994 (South African History Online, 2017). Before then, SA was marked by anti-colonial wars and the struggle against the apartheid system where their designated racial group determined a person's place in society. Subsequently according to the South African History Online (2016), the education system, was designed around the policy and brought into law by the Bantu Education Act of 1953.

This Act was commitment by the apartheid government to keep the education system of black South Africans separate and inferior to that of white South Africans. One of the most significant points in the struggle against apartheid was the rejection of Bantu Education by the youth of SA through a series of uprisings culminating into mass protest action on June 16, 1976. Since the first democratic general election in 1994, the nation has been transitioning from a largely rural society to an urban one. Thousands of people leave the former Bantustans and homelands, set up by the

apartheid regime, in search of a better life in SA's urban centres with Gauteng Province being the largest as the country's economic hub.

Gauteng Province experiences a constant influx of people from its surrounding provinces and immigrants from various African countries and the world. A large number of people from both local and international migrant families have their children enrolled in EC centres and schools across the province. Early childhood development practitioners have to work with children and families from a range of diverse backgrounds, which can prove to be a daunting and challenging task. However, at the heart of these EC centres are the practitioners who need to be supported and skilled to function in a culturally diverse context.

Often times the lives that migrant families leave behind at home are difficult, but many still struggle to find life in the city any easier (Barbarin & Ritcher, 2001, p. 15). Looking into the future, changes in the social fabric of South African EC centres will require that practitioners and their leaders develop a deeper level of sensitivity to the cultural and linguistic needs of their learners. Gumbo (2001, p. 233) argues that a learner's development may be negatively affected if cultural habits are not concurrently developed with other areas of their learning. In order for EC leaders to provide effective support to practitioners, enabling them to operate effectively in these culturally diverse classrooms, their attitude, knowledge base and cultural intelligence is crucial. Cultural diversity and inclusion need to be considered when institutions are re-curricula ting.

Background and status of early childhood in South Africa

It is compulsory that by age seven, every child should be at school as required by the South African education system. Children under the age of seven are supposed to be registered in a pre-school or a day care centre. One of the South African Government's goals is to make early childhood education accessible to all South African children. There are two EC structures in SA. One structure regulated by the province and sponsored by the government and the other is autonomous and run by private bodies or communities. Both the government and private structures comprise of Pre-Grade R and Grade R programs (Reception Year) as the two main constituents. The programmes in Pre-Grade R are designed for children between 0-4 years of age, and Grade R programs are appropriate for 5-6 year-olds. The most commonly used term for EC in SA is early childhood development (ECD). In this paper, the author will use the term early childhood (EC). The Department of Education (DoE) defines ECD as 'an umbrella term that applies to the processes of child development from birth to nine years of age. It summarises the physical, mental, emotional, spiritual, moral and social development of the child' (Department of Education, 2001, p. 9).

Currently the accountability for EC in SA is spread across three government departments, that is: the Department of Social Development (DSD), Department of Basic Education (DBE) and the Department of Health (DoH). The three departmental governments collaborate with different responsibilities such as children's social, health and education issues towards the achievement of quality practices and services in the EC sector. Storkbeck and Moodley (2011) highlight the lack of cohesion between the DSD, DBE and DoH as regards to the age categories to be included in the term 'EC'. However, there is a common acknowledgement of

how important the holistic development of the children is, in all areas. In his recent State of the Nation's Address (SoNA), President Cyril Ramaphosa pointed out the government's intent to transfer the EC responsibility from the DSD to that of DBE and introduce a second year of compulsory early learning before school.

These intermediations should be capacitated to provide the level of support required to implement a province-wide strategy for EC as envisaged in Section 93 of the Children's Act. Optimal development of children requires skilled and well-supported caregivers and practitioners. In other words, collaboration with all the stakeholders is important. Even though the responsibility of EC will be migrated to the Department of Basic Education as the department responsible for curriculum issues, there would still be a need for synergy between the three governmental departments. More support and training will also be required. Modise (2017, p. 19) defines support in the context of this paper as a technique afforded practitioners by relevant stakeholders to make teaching and learning in EC classes effective.

The context of early childhood centres in the townships

Since the birth of democracy in South Africa (SA), the country saw the rise in the establishment of EC centres. In SA, EC centres are business opportunities for unemployed mothers and grannies. Most of the centres in the townships operate without proper documentation. Some centres have registered with the DSD and the DBE. Most practitioners in both registered and unregistered EC centres do not have appropriate qualifications. However, currently there had been a slight shift in the status quo. The Department of Education has provided bursaries to some pre grade one (Grade R) practitioners based in both communities and schools to obtain a three-year qualification. This still leaves a huge gap of untrained Grade R practitioners including the practitioners in the birth to four-year olds category. This poses a challenge in the EC sector and compromises the provision of high quality practices. The problem remains because the majority of EC leaders are centre owners and of older ages and lack EC qualifications. They are not that keen to advance themselves further academically as they have concluded that they are old. This creates a challenge because EC practitioners need regular support from their centre leaders, more so because they do not possess any formal training and function in diverse and multicultural environments. According to Modise (2017, p. 2), there is no proper support for EC practitioners from the supervisors being their leaders. EC practitioners in Gauteng are said to be functioning alone with no support from the leaders especially the Grade R practitioners (Modise, 2017, p. 3).

Besides trainings that practitioners may receive from Non-Government Organisations (NGO), they also require more intense support on a daily basis on how to function in multicultural classrooms. The EC centres in SA are dealing with migrant children who come from different cultural and social backgrounds. The 2006 National Child Care Strategy has to provide guidance to ensure shared commitment from the EC teachers' team towards anti-discrimination practices. Although SA has 11 official languages, practitioners still are confronted with the realities of understanding and communicating with learners of diverse languages in class. Majority of EC centres in townships are under resourced and over-crowding is on high with un-favourable learner/teacher ratio.

Dynamics of migration in South Africa

Immigration from the Southern African Development Community (SADC) countries has shaped largely by a history of labour migration during the apartheid era. This is part of SA's history and cannot be erased or omitted in the narrations of SA's history and background. As a result, schools and EC centres in SA have become more diverse in terms of social, racial, linguistic, cultural, religious make up over the past 23 years. There are also practitioners and parents from diverse cultural backgrounds that the EC leaders have to consider when planning programmes. EC services need to be more sensitive to the cultural and linguistic needs of migrant children. Practitioners who are directly involved need support from their centre leaders and parents as well. EC leaders, according to the National Child Care Strategy (2006, p. 21), are required to provide guidance and support to ensure shared commitment from the EC practitioners towards *anti-discrimination practices*.

Defining culturally diverse context

According to the Cambridge Dictionary (n.d.), culture is 'the way of life, especially the general customs and beliefs, of a particular group of people at a particular time'. Each EC center is an institute with its own values, beliefs, ethos and practices. It is imperative that each structure of the South African EC system embraces diversity as a core value, from the government department right down to the individual centers. SA was founded on the very principles of diversity and inclusion. 'We the People of South Africa believe that South Africa belongs to all who live in it, united in our diversity' (Constitutional Assembly, 1996). Leaders need to be knowledgeable and skilled in leading and managing in a culturally diverse context because EC centres enroll learners from diverse cultural backgrounds. This is especially true for EC centres in the Gauteng province. SA will not get away with this kind of status quo. Nigrini (2016, p. 6) is of the opinion that cultural diversity is important as one of the main factors that lead to curriculum changes in the democratic SA. SA itself is naturally a culturally diverse country. South Africa, and indeed Gauteng, is a key destination for people from neighbouring provinces and countries seeking employment opportunities.

Theoretical framework

This desktop research is based on Vygotsky's model of mediated learning. According to Sills, Rowse and Emerson (2016), Vygotsky's argument is that the child's Zone of Proximal Development (ZPD) determines the difference between what children could achieve independently and what they could achieve through collaboration with more able partners. Putting this into the context of this paper, it simply means that, the EC practitioners' level of understanding and knowledge will determine what they themselves could achieve when working in isolation without support of their leaders and when they receive support from their leaders. Since these practitioners are not professionally qualified their interaction with the diverse nature of their learners might be flawed and not promote effective and inclusive teaching. The situation might be different if there is collaboration with the leadership through supervision and support of their practices.

Implications of supporting practitioners in culturally diverse EC centres

For EC leadership, it is expected of EC leaders to endeavor to provide services of the highest quality in all aspects of their offering. They are to offer the necessary support to their subordinates, create the conditions conducive for making sure that procedures and policies needed to address diversity and equality issues effectively in EC centres are implemented. Leaders are to make sure that diversity challenges encountered by learners, teachers and parents are addressed. Programmes and curriculum offered should seek to address issues holistically. There need to be collective planning to achieve the centre's goals. Ethical considerations and cultural diversity issues need to be taken into consideration.

For EC practitioners, there will be improved practitioner performance. Building practitioners' confidence in interacting with diverse learners in the classroom, preparations will take into consideration diverse cultural backgrounds of learners; discrimination of learners based on their cultural background will be minimised; and mutual understanding between children's parents and the EC centers.

For EC children, they will be accepted as they are and their learning be planned accordingly to meet their individual needs. They will not feel inferior about who they are and accept each other.

Recommendations

The quality of leadership in EC centres is critical to creating an environment that is conducive to fostering diversity. In her article 'Managing workforce diversity in South African schools', Rita Niemann (2006) highlights the principles below that leaders could use as guidelines to leading in the culturally diverse classrooms and staff environment:

Self-evaluation – EC leaders are to confront the stereotypes, ethnic and cultural prejudices by undertaking to evaluate themselves persistently on a continuous basis (Niemann, 2006, p. 108). Evaluating themselves will help them in recognising their limitations and will seek to fill the gaps they have identified.

Approach – Niemann (2006) emphasises the need for leaders to take a balanced and objective approach to diversity that is as broad as possible without reinforcing traditional biases and stereotypes. Since the practitioners themselves are also from culturally diverse groups, they need support from leaders to work co-operatively with each other and the children's parents to enhance their understanding of diversity in their classrooms to the best interest of the EC children.

Rewarding good work – Rewarding good work is one of the workers' motivations. Leaders, according to Niemann (2006), should involve the whole team of staff including practitioners when instituting the standards for what constitutes satisfactory and exceptional performance (Niemann, 2006, p. 109).

Support – Provision of support requires high level of commitment from the leadership team. Niemann suggests that EC centres should intentionally draft a policy on diversity. Practitioners, as part of the staff, should be allowed to contribute so that they own the policy. Niemann (2006) is of a view that without strong moral and ethical reference points EC centres will be rudderless. Thus allowing many kids to fall through cracks of a system that excludes them.

Empowerment – Diverse people have to work together, and institutions should take care that the tension and conflict resulting from differences does not destroy the harmony and unity an institution seeks to achieve (Niemann, 2006, p. 110).

The leaders may adopt Niemann's principles since they are relevant to EC practices.

Establishing relationship with parents is of key in making sure that there is flourishing support to practitioners operating in diverse cultural environments. Parents will also provide additional support to practitioners' understanding of the diverse nature of their classrooms. Ethical considerations would also play an extensive role.

Conclusion

24 years after democracy, South Africa's EC and education system struggles to undo the damage done by the Bantu education system. To move on from a past that has been characterised by segregation and ethnic conflict, South Africa needs to be equipped to deal with an environment of diversity. This will open up a large pool of ideas from which to draw and imagine the future of education. Through continuous self-evaluation, practitioners will hone the skills necessary to adapt to an environment that is constantly changing. By adopting a balanced and objective approach to leadership, EC leaders can nullify traditional biases. By rewarding good work, leaders establish and reinforce performance standards. When there is a strong commitment from the upper structures of management, a level of integrity is established that will allow each EC centre to achieve its objectives.

When diversity is incorporated into the leadership strategy of the given institution, institutional efficiency is enhanced. By collaborating on a regional level, leaders will be empowered to lead in a diverse context. Collaboration within and across the department will yield a far-reaching impact on the future of education and EC in South Africa. Meier and Hartel (2009) indicate that handling diversity effectively in education, educators (practitioners) need to recognise the rationality of transformations. It requires firstly a reevaluation of personal and institutional philosophies and perceptions, and secondly a frank conviction and commitment to enable and achieve learner diversity. The statements are so true for leaders and practitioners in EC centers.

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Part 6

Research Education & Research Practice

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Examining the Assessment of Anchoring Vignettes in Different Information and Communication Technology Competence Domains: The Results of a Pilot Study Among Upper-Secondary Students

Abstract

The anchoring vignette method has been proposed as an innovative approach to solve the problem with self-assessment data incomparability caused by the differences in scale usage between respondents. In this study, we use a set of 15 anchoring vignettes describing different domains of ICT skills (Information, Communication, Content creation, Safety, and Problem solving) to examine the differences in scale usage between Czech upper-secondary students (N = 166) studying at different types of schools in these domains of ICT competence. Our preliminary results suggest that students studying at different types of schools seem to have different standards for vignette evaluation (i.e. they use the scale differently), however, we also identified certain similarities in the way students from a particular school use the scale across the five ICT competence domains. Such findings might be of high relevance for the further use of the anchoring vignette method in ICT competence research, however, further investigation in this research area is necessary.

Keywords: differences in scale usage, anchoring vignettes, self-assessment, ICT skills,
            DigComp framework

Introduction

In educational research, student self-assessment questionnaires containing items with rating scales are a frequently used approach of data collection. Such data are then commonly used to compare different groups of students based on their characteristics such as gender, ethnicity, or socioeconomic status. However, there has been a long-term concern about the comparability of such data, which might be hindered by the differences in the way respondents use scales to assess various concepts (Vonkova, Papajoanu & Bendl, 2016).

For example, it might be the case that two students with the same level of particular concept (e.g. ICT skills) assess their skills on a scale: (1) *excellent*, (2) *very good*, (3) *good*, (4) *poor*, (5) *very poor* differently – one student as *excellent*, the other student only as *very good* (Vonkova & Hrabak, 2015). These differences

might lead researchers to erroneous conclusions about the actual level of the measured concept, making the comparison between students inaccurate.

In the literature, some paradoxical findings have been documented both at the international level (He & van de Vijver, 2016; Kyllonen & Bertling, 2013; Vonkova, Zamarro & Hitt, 2018) and intra-country level (Vonkova & Hrabak, 2015; West et al., 2016). For example, using PISA 2012 country-aggregated data, He and van de Vijver (2016) found a negative relationship between student mathematic achievement and their motivation to learn mathematics. These striking results might be attributable to the differences in which respondents use scales.

The anchoring vignette method

Several methodological approaches have been proposed to solve the problem with scale usage differences among respondents, such as the anchoring vignette method (King et al., 2004), the identification of response styles irrespective of the item content (Baumgartner & Steenkamp, 2001; He & van de Vijver, 2016), or the overclaiming technique (Paulhus et al., 2003; Vonkova, Papajoanu & Stipek, 2018). The anchoring vignette method, the approach that we use in this paper, was first introduced by King et al. (2004) in research on political efficacy.

The basic idea of the method is that we let respondents not only assess themselves but also a set of anchoring vignettes, which are short stories describing certain levels of the measured concept (King et al., 2004). Since all the respondents assess the same anchoring vignettes, the differences in their assessments might be interpreted as the differences in which they use the scale. This information can be then used to adjust their self-assessments, leading to better data comparability.

Since its introduction, the method has been successfully applied in many research areas such as health (Bago d'Uva, O'Donnell & van Doorslaer, 2008), personality (Weiss & Roberts, 2018), life satisfaction (Angelini et al., 2012), or satisfaction with social contacts (Bonsang & van Soest, 2012). In educational research, there is a growing number of studies using the method in domains such as school discipline (Vonkova, Bendl & Papajoanu, 2017) or ICT knowledge and skills (Vonkova & Hrabak, 2015). The method was also included in Programme for International Student Assessment (PISA) studies in 2012 and 2015 and several secondary analyses of PISA vignette data have been published (e.g. He & van de Vijver, 2016; Vonkova, Zamarro & Hitt, 2018).

Application of the anchoring vignette method in the area of ICT knowledge and skills measurement

Technologies affect people's lives in many areas being it at school, in the workplace, or in the community and the development of ICT skills have become a major part of people's education (Fraillon et al., 2014). These developments warrant that we accurately measure these skills across different groups of students according to their characteristics such as gender, cultural, or socioeconomic background. Self-assessment measures of ICT skills have been widely reported and interpreted as a proxy measure of actual ICT literacy (Siddiq et al., 2016). Their main advantage in comparison to performance tests might be low monetary costs and time requirements of their administration, making them an appropriate tool for large-scale data collection.

The previous study by Vonkova and Hrabak (2015), however, documented that the comparison of different groups of students based solely on their self-assessment of ICT skills might lead to contra-intuitive results, suggesting that scale usage differences between respondents are an important issue in this area of research. They found that students studying ICT reported a lower level (though non-significantly) of ICT skills than students studying pedagogy and business (non-ICT students). After the adjustment of students' self-assessment of ICT skills using the anchoring vignette method, the results were the opposite – ICT students reporting a higher level of ICT skills than non-ICT students. These intuitively more compelling results suggest that the anchoring vignette method is a promising approach in this research area that needs to be further examined.

Our study builds on the previous literature in several ways. In their study, Vonkova and Hrabak (2015) used only one set of anchoring vignettes describing general ICT skills that were based primarily on national curriculum. In this study, we use five sets of anchoring vignettes based on the five areas of ICT competencies as defined in the DigComp framework – a framework for developing and understanding digital competence in Europe: Information, Communication, Content creation, Safety, and Problem solving (Ferrari, 2013). This more detailed approach allows to identify the differences in scale usage for the particular areas of ICT skills.

In PISA 2012, anchoring vignettes for teacher's classroom management were used to compute twelve adjusted indices ranging from attitude towards school to instrumental motivation for mathematics (OECD, 2013). The assumption was that the rating standards (i.e. use of scale) of respondents do not vary across domains and vignettes describing one domain can be used to adjust self-reports in other domains. However, as documented by Vonkova et al. (2017), in their study students used the scale differently when assessing vignettes describing different subdomains of school behavior (e.g. dishonest behavior in school, bullying).

It still remains to be investigated whether the use of scale by the respondents differs across different areas of ICT skills. The use of a single set of vignettes to adjust different self-assessment questions might decrease the administration costs of the questionnaire and decrease the demands placed on the respondents, especially when younger students are surveyed. However, if there are differences in the way the respondents use scales in different areas of ICT skills, using a single set of vignettes might make the adjustment inaccurate.

In this study, we use the anchoring vignette method to examine the differences in scale usage between different groups of Czech upper-secondary students in various domains of ICT skills as defined by the DigComp framework. Our main research question is as follows: What are the differences in the way students from different schools use the scale in different domains of ICT skills as defined by DigComp?

Methodology

In this section, we (a) describe the anchoring vignettes used in this study that portray different areas of ICT skills based on the DigComp framework and (b) provide an example of a vignette from the domain Information. Then we describe the sample consisting of Czech upper-secondary schools of different types. The data

were collected as a part of a pilot study preceding a large-scale data collection on a representative sample of Czech upper-secondary schools of different types.

Anchoring vignettes describing different areas of ICT competence

For the creation of the anchoring vignettes, we used the DigComp framework (Ferrari, 2013) which defines five areas of ICT competence: Information, Communication, Content creation, Safety, and Problem solving. In each of these areas, three competence levels are distinguished: foundation, intermediate, and advanced. For each area, we developed three vignettes corresponding to the three competence levels, making the total of fifteen vignettes.

Note that our vignettes were shortened in comparison to the original DigComp descriptions with the aim of keeping the fundamental information but not overburdening the respondents with too long vignettes. We also added concrete examples into the vignettes in order to make them more understandable for the respondents. Also, the requirements described in the advanced level vignettes (corresponding to the advanced DigComp level) were slightly lowered to be more relevant to upper-secondary students. An example of an intermediate level vignette in the Information domain is (Vonkova et al., 2019):

> *Elisabeth uses internet search engines to search for information. She compares and validates information obtained from various sources on several web pages. She uses search engine filters (e.g. only pictures, only pages in the Czech language) to get the best results. She downloads the information and files she needs and sorts them into folders.*

The respondents assessed the vignettes in a randomized order for each domain on a 7-point scale ranging from 1 = *the lowest level* to 7 = *the highest level*.

Sample

Data collection took place at four Czech upper-secondary schools (ISCED 3, age 15 – 19) in the first (initial) year and the fourth (final) year of study (total N = 166). We included students from: (a) a humanities oriented school offering a study programme Pedagogical Lyceum (56 students), (b) a technical non-ICT school focused on transport and mechanization (25 students), (c) a grammar school providing general education (47 students), and (d) a technical school offering a study programme focused on ICT (38 students). All four study programmes are four years long and are completed by School Leaving Examination. Since each chosen school was of a different type, the students were expected to have a different ICT background.

Results and discussion

Our results suggest that there are certain regularities in the assessments of students from different schools across the different ICT skills domains. For each school, we computed the mean assessment of each of the vignettes. Then, for each of the vignettes, we ranked the schools according to their mean assessment. The analysis showed that schools tended to rank similarly across the different ICT skills domains.

These results indicate that there might be a certain regular pattern in the way the respondents from different schools use scale across different domains of ICT skills. Such a conclusion might be of great importance to researchers in the domain of ICT skills measurement since they could administer only one set of anchoring vignettes describing a single domain and, using these vignettes, adjust a variety of self-assessment questions aiming at different domains of ICT skills. However, our results are only preliminary and further investigation of this issue seems advisable before making any definitive conclusions.

The issue of using vignettes describing a certain domain of a concept to adjust self-assessments of other unrelated concepts (or different subdomains of the same concept) seems still inconclusive and requires further exploration. Despite the approach used in PISA (OECD, 2013), Vonkova et al. (2017) showed that using vignettes describing other subdomains of student school behavior such as bullying to adjust student self-assessment of dishonest behavior is not recommendable. It might be possible that the different nature of the measured concepts plays role in the way respondents use scales across its subdomains.

In school behavior research, students might have very different evaluation standards when a student bullies another student and when a student cheats on his or her homework. These two subdomains of school behavior might be perceived as very different in nature and their severity. In the research on ICT knowledge and skills, on the other hand, students might have very similar evaluation standards across its subdomains, since the particular subdomains (e.g. programming, graphics) might be perceived in a similar fashion.

Conclusion

In this study, we investigated the differences in scale usage between different groups of Czech upper-secondary students in different domains of ICT skills as defined by DigComp. Our results indicate that students studying at different types of upper-secondary schools (and, presumably, with different ICT background), indeed, seem to use scale differently when assessing anchoring vignettes describing different domains of ICT skills. However, a closer analysis revealed that there might be certain regularities in the way these students assess anchoring vignettes across these different domains. These similarities across the different ICT competence areas might suggest that students tend to use the scale across these areas consistently.

Future research could investigate the differences in scale use across different ICT skills domains on a larger, perhaps a representative sample of students. Our results are only preliminary since the data were collected as a part of a pilot study on a limited number of schools. It would also seem appropriate to further investigate the possibilities and limitations of using vignettes describing one concept to adjust self-assessments of other concepts (or other subdomains of the same concept) with respect to the nature of the measured concepts.

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The Effects of Gender on the Teachers' Competences and Effectiveness

Abstract

This research examines how gender roles are affecting teachers' professional development (TPD) in Hungary. Are there significant differences in the career path between male and female teachers? What kind of degrees do they have? How they have chosen their in-service training? Is the longer and – according to the literature – more effective training more popular? Many researchers examined what makes TPD effective. The TALIS 2013 (OECD, 2013) listed the features of high-quality TPD, which are: content focus; collective participation; active learning; duration (longer term TPD programs are more effective) and coherence. There are only a few Anglo-Saxon researchers, who examined the gender specificities of the teaching profession, even though the teacher's role is definitely related to gender roles. The probability that one chooses the teaching career and later leaves or stays are not independent from the teacher's feminine image and the status of the teaching profession. The results show that the use of diverse teaching methods, following teaching novelties and participation in high-standard further education are more important for women. At the same time, for male teachers the transfer of knowledge and scientific career are more important. We see one of the traditional masculine-feminine dichotomies: knowledge or personality centeredness. This means that academic knowledge, the development of theoretical knowledge appear much more emphatically with men; and the intention of getting to know the personal problems of students or the pursuit of equal opportunities with women.

Keywords: teacher training, gender, competences, continuous professional development

Introduction

The research on the teachers' career path, efficiency and commitment has got greater and greater emphasis in the past years, however, it is not yet obvious what a 'good' teacher is like. The teacher's role is complex and incidental; and because it is difficult to describe, the skills needed for the practice of the profession often reflect personality traits that one must be 'born with' (Fónai, 2012; Papp, 2001). Early research on efficiency tried to investigate the characteristics needed for the teachers, however there is still a professional discourse on the personality traits, abilities or systems of abilities that are said to be ideal. Of course there are measurable characteristics like qualifications or knowledge of the subject but they do not linearly affect the performance of the students. According to the scholarly literature there is a stronger correlation, for instance, between effectiveness and reflectivity or the use of various teaching methods, however, these are far more difficult to apprehend (Bacskai, 2015; Trentinné Benkő, 2015). During the last decade the literature aimed to describe the adequate competences instead of the needed characteristics. The interpretation of the concept of competence is not uniform. Today, the concept of competence is associated with professional development, so

much so that professional development means the development of teacher's competences; including attitudes, values and knowledge. Latest research also indicates that self-reflection is important. The advancement and the development of the teacher competences starts during teacher training and under optimal conditions it continues during the years spent with teaching (Falus, 2001; Ganser, 2000; Korom, 2010; Villegas-Reimers, 2003). The clear use of the concept of competence is made difficult by the fact that this is also used for the teacher advancement and rating system in many countries, however, we can find crucial differences between certain systems. The elaboration of standards started in the United States (US) at the beginning of the 1990s. Today, the Anglo-Saxon systems are all built on standards, which have to be met for completing each educational level. In the US we can find different indicators in every state so the systems are not uniform. In the United Kingdom (UK) there are some differences among the member states: for instance, the English carrier model has 5, while the Scottish model has 3+3 levels, although both contain professional values and competences.

As in the US, Central and Eastern European countries such as Slovakia, Hungary and Romania have developed similar system of teachers' advancement. These countries tried to adopt the US system; therefore teacher competences became a central concept in these systems. The advancement to higher degree occurs after specified years in practice and completion of the exams (Bikics, 2011; Bordás, 2015; Felméry, 2011; Kovács, 2015; Nagy, 2015; Németh, 2015).

The researchers of the Education Research and Development Institute in Hungary, between 2013 and 2015, examined what in-service teachers think about these competences and the overall carrier model. The comparison relied on the self-evaluation of the professional competences of career entrants and teachers with longer working experience. In most fields of competence – for example, supporting, organizing and managing learning – career entrants gave lower values for themselves, which can be explained in the context of different lengths of professional practice. However, in two fields: (a) pedagogical development and innovation and (b) the field of analysis and research career, entrants and more experienced teachers considered themselves not sufficiently advanced (Sági & Szemerszki, 2016).

It is also important to mention that the gender stereotypes do exist. For instance, the competences such as caring or success in personal relationships are attributed more to women. Meanwhile, competences such as good leadership skill or success in sciences are attributed to men. The effective teacher, in all teachers' fields of competences, needs to have characteristics which are more feminine (e.g. tolerance, sociability) and more masculine (e.g. self-advocacy and firmness) regardless of their gender. However, according to some researchers, a teacher with more feminine characteristics performs poorly in some, stereotypically considered masculine, actions such as assertiveness, self-reflection and leadership (Figula, 2000; Szabó, 1997; 1998). Nonetheless, researchers rarely take gender in consideration.

Research methodology

In this paper, I am going to examine whether gender is an influence factor in the field of competences. The research is based on the database of the TELEMACHUS 2014 (TEachers' LEarning Motivation and AChievement in eastern part of Hungary Survey). The data collection was done by the researchers of the Centre of Higher

Education Research and Development at the University of Debrecen (CHERD-Hungary) between 1 October and 15 November 2014. The participants completed paper-based questionnaires, which were then supplemented with an online data collection carried out in the districts of the public educational institutions with pedagogical training at the University of Debrecen. The database included the responses of 1056 respondents. The age and gender characteristic of the sample are representative of the characteristics of Hungarian teachers.

Because of the applied questions we have to raise the attention to the fact that the demand of trainings and the existing knowledge do not correlate according to our experience. In an earlier research, which explored students in teacher training in Debrecen, we found great differences between female and male students. Female students generally asked for a longer time of training than male students: more than half of the male sample wanted to have a half-year training while only one third of the women agreed with this; the level of significance was P=0,021. In connection to the different gender socialization, Kereszty (2014) brought attention to the fact that women have a more positive attitude towards learning and drive in school to meet the expectations. We took this into consideration when analysing the demands for training in certain fields of competence. In our block of questions we inquired from teachers what further training was needed for certain tasks and problems? The reported competences have emphasized significance in the advancement of life career model in Hungary: the future professional ratings depend on the development of competences and the earlier mentioned exams.

Results

Many of the teacher respondents would like to have training on effective problem-solving: 86.1 percent of them gave a positive, yes answer to this possibility. There is also a higher rate for further training on the development of students' personalities (81.5 percent) and supporting students' learning.

On the other end of the scale, there are two trainings or fields of competence which were supported by only half of the respondents. These are support for equality, integrational activities (50.5 percent) and the evaluation and analysis of pedagogical processes (52 percent). For the latter one, it is worth mentioning that 'the planning of pedagogical activities and self-reflection' was also rated as one of the less important tasks. Therefore, it seems that self-reflection, though its significance is often emphasized, does not play such an important role in the everyday practice of teachers.

We found significant differences between male and female teachers, and between the levels of education. The extensive analysis of the data shows that women are more willing to take part in any further training than men. In the same way, the demand for general training is decreasing from kindergarten teachers towards the secondary school teachers. We can assume that in case only significant differences were examined then in most cases the results would show that more women would like to take part in training than men (and more kindergarten teachers than secondary school teachers). Looking at the rankings of certain tasks according to gender, we can see really significant – more than two ranks apart – differences in case of three fields. The ranking was based on the proportion of those who wanted to develop these competences. The development of the student's personality and the

development of SNI (students with special needs), BTM (students with behavioural disorder) students and the preparedness for integrated education are more important for women: they put the first one second as opposed to the men who put it in the sixth place; the second got the seventh place for women and the same got to the twelfth place, which is the last but one. Academic knowledge, however, is much more important for men; it is ranked fourth on the scale while it is only ranked in the eight places in the case of women.

We also examined whether there is a traceable relationship among the importance of the mentioned competences and whether there are any fields of competence that qualify to be developed for a group of teachers. During the factor analysis I managed to establish 3 factors, named Professional development centred, Equality and student centred and Learning centred teachers. I used Maximum likelihood method.

Professional development and analysis of pedagogical processes were of high priority for teachers in the professional development centred factor. Besides that, communication, cooperation and problem solving were emphasized. In the second factor the emphasis was placed on the development of the students' personality, support for equality and integrational activity, the development of SNI, BTM students and methodological preparedness for integrated education. This factor, therefore, received the name of equality and student-centred. In the third, learning centred factor the academic knowledge was the most important followed by the support of the students' learning and organizing teaching activities and the related reflection ability. Regarding gender, the equality and student centred factor shows a strongly significant difference: it is not surprising that women are overrepresented in this traditionally more feminine factor which puts care and provision in the forefront. The second factor is interesting in connection with leaving the teaching career but the correlation is less strong: those who are part of this group are more devoted to the teaching career. It seems that this is the kind of teacher image that meets the real expectations.

For the sake of further possible correlations, I used multivariate analysis (made regression models) to see whether fields of competence in one indicator relate to any other characteristics as well. The first model had only the gender, the second had gender and level of education and the third model included the previous fields with cultural and financial capital and the type of the settlement of the permanent residency.

In case of the professional development-centred factor, we found significant correlation with their qualifications, while there is no perceptible effect of the other indicators of cultural or financial capital. In case of teachers getting their first degree in a college the correlation is negative; therefore they find these competences less important, while teachers getting university degree – as first or second degree – had these indicators have a higher chance of application. It seems that getting the qualification of a university degree is the most important influential factor, independent from the fact whether it is a first, second or third degree.

In case of equality and student-centred factor the gender has the highest effect and this does not change after taking more variants in consideration. In the case of secondary school teachers these indicators of competence appear with a lower chance, which was also evident in the cross-analysis. At the same time, it is interesting that after including the indicators of the cultural and financial capitals,

the significant difference between the levels of teaching disappears. It could be a matter of further research to see which factors cause these effects; we can assume that the nature of the obtained degree is a modifying factor as our earlier analyses showed that among those with a university degree the value of the academic knowledge increases. In case of including more variants with the learning-centred factor, it does not show any correlation with any attributes.

Conclusions

Analysing the factors with regards to the fields of competence, we see that there is no difference in the factors connecting to learning and teaching with regards to gender. Support for equality, personality centeredness, use of diverse teaching methods and professional rejuvenation is more important for women. But there is no difference in gender in terms of competences regarding the importance of knowledge not even in fields of competence that include cooperation, problem-solving and evaluating pedagogical processes. Therefore, some of the feminine expectations connected to the teacher's role are more fit to the role perception of women, in other respects; however, we do not see a difference. According to stereotypes, innovation is a masculine feature, yet it is more important for women; the reason for this could be a matter of further research.

Some of the fields of competence are important for all teachers, for example, development of competences of effective problem-solving or supporting the students' learning. One of the traditional masculine-feminine dichotomy can be detected, namely knowledge or personality centeredness meaning that academic knowledge, consisting of the development of theoretical knowledge appear much more emphatically with men than the intention of getting to know the personal problems of students or the pursuit of equal opportunities with women. It is interesting that the development of the students' personalities is equally important for both women and men, however, men want to achieve it indirectly, during their lessons.

Another difference in gender is that the use of diverse teaching methods, following teaching novelties and participation in high-standard further education, are measurably more important for women. This can be caused by several factors. For instance, it is possible that some of the male teachers stick more to the frontal teaching methods while female teachers have a more positive attitude towards professional development. For the effective realization of the teacher's role, however, independently from gender, the importance of the mentioned competences would be adherent, so in case of men, it could be a matter of further research on how their attitudes could be made more positive.

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Part 7

Thirty Years since the Fall of the Berlin Wall: Educational Reforms Worldwide

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Teacher Education in a Post-1989 World: A Comparison between Lithuania and South Africa: Global Isomorphism, Regional Hegemony/Homogeny, or Resilient Local Context?

Abstract

Taking the example of post-1989 teacher education reform in Lithuania, and comparing that with teacher education reform in South Africa, a country that also underwent a total societal reconstruction at the same time as Lithuania, this paper defends the thesis that the configuration of education at grass roots level, is the outcome of a dialectical play of forces at various geographical levels, including the global, the regional or supra-national, the national and the sub-national or local.

Keywords: context, global, Lithuania, South Africa, regional, teacher education

Introduction

With the example of teacher education in Lithuania and by taking South Africa as datum line, this paper investigates the validity of the concept of the East Bloc as taxon in Comparative and International Education. Secondly the paper serves as an illustration of the thesis (expounded by one of the authors, Wolhuter, 2019) namely that the concept of "glocal" is too vague and represents an oversimplification, and that Comparative and International Education scholars are in need of a much finer calibrated instrument for their analyses and explications as to how the education systems in the contemporary world are shaped by dynamic dialectic playing out itself over a hierarchy of several contexts.

Societal contexts

Globally

The early twenty-first century is defined by a number of features, including the ecological crisis, demographic trends, the information and communications technology revolution, growing affluence, the rise of knowledge economies, the

demise of the once omnipotent nation state, democratization, and the neo-liberal economic revolution (cf. Steyn & Wolhuter, 2019). Demographic trends refer to the population growth in the Global South, the Global North approaching zero and even, in some places, negative population growth, and the increasing mobility of people. A knowledge economy is an economy where the production and consumption of new knowledge has become the driving axis of the economy.

Eastern Europe

For four decades since the end of the Second World War, the countries of Eastern Europe fell under the totalitarian socialist governments, and were cut off from each other as well as from the rest of the world. As from c. 1990, these countries were the scene of instant democratization and a change to free market economies. The new environment also meant an end to international isolation, and on the other hand, social space for the development of national identities and for religion was opened.

Lithuania

Situated at the extreme Western tip of the Erstwhile East Bloc, Lithuania has a small population of 2.79 million (February 2019). Due to low birth rates and high emigration rates, the country has a negative population growth rate. Lithuania joined the Bologna process in 1999, and became a member of the European Union in 2004. Culturally and linguistically it is a relatively homogenous society, with about 87 percent (2018) of the population speaking Lithuanian as home language. For most years since 1991, the country was characterized by strong economic growth rates. Lithuania is a post-industrial society, with a service based economy. Religiously the majority of the population are Christians, of the Roman Catholic denomination.

Africa

Virtually all of the fifty three states of Africa are recent entities, having attained independence from their erstwhile colonial masters in Europe, around 1960. After a dismal performance during the first decades after independence, the fall of the Berlin Wall (and demise of the East Bloc and its influence in the Global South) has triggered political democratization and a neo-liberal economic revolution in the African region as well. The past three decades Africa has keep rising in economic performance, and its combined economic, demographic and geographical weight is making it an ever larger player in global politics (cf. Wolhuter & Wiseman, 2013).

South Africa

As from 1994 South Africa has undergone a socio-political transformation comparable, though not identical, to the decolonization wave that swept through the continent in the decades after the Second World War roughly from North to South; in fact, South Africa was the last African country destined for this fundamental change. The global context of the neo-liberal economic revolution and the democratization that has characterized the world in the period after 1989, shaped and at the same time placed constraints on the re-configuration of the South African economic and political landscape. While an upper-middle income country with per capita income and enrolment ratios at all levels of education far ahead that of the rest of Sub-Saharan Africa, poverty is widespread, and education still quantitatively undersupplied, of poor quality and unequal participation (cf. Wolhuter, 2014).

Education

Globally

The affluence which followed the onset of the neo-liberal economic revolution, the new emphasis placed on the value of education in a Knowledge Economy, and the information and communications technology revolution resulted in an explosion of enrolment numbers all over the world, at all levels of education, but most markedly on the higher education level. In the short space of sixteen years, from 2000 to 2016, higher education enrolments globally more than doubled, from 99.5 million to 215.9 million (UNESCO, 2019). The neo-liberal economic revolution also brought with it a call for relevance in curricula, and carried into the education sector its principles of performativity, efficiency, and the profit motive (cf. Davies & Bansel, 2007).

Eastern Europe

The main features of post-1990 education reform in Eastern Europe were the deideologisation of education, decentralization, opening of spaces for internationalization and nationalism, and differentiation and diversification. Ideological indoctrinating pressures on education were lifted, and replaced by a new philosophy of "humanization of education" informing education policy and practice (Mitter, 1992, p. 21). The old ideal of the "total communist person" as educational objective was discarded, and respect for individuality and individual skills as a true and tangible humanism became evident (Wolhuter, 1996, p. 27).

Lithuania

Post-1989 Lithuanian education aims reflect the new political and economic context as outlined above. According to the Concept of Education in Lithuania (1993) the ultimate goal of education is a personality with developed physical, psychical and spiritual powers, ready to live in a democratic society, capable of creative acceptance and development of humanistic national and universal cultural values (Želvys, 2019).

The neo-liberal economic revolution eventually shifted the focus of attention from sociocultural towards the economic mission of education. Outcomes-based approach and cost-effectiveness became the main driving forces of educational changes during the last two decades. Furthermore the country has been hit by reduced enrollments, due to demographic dynamics (declining births and a strong stream of emigrants) as well as by a decline in quality of education, at the level of higher education in particular, due to decreasing public funding of higher education, which shrinked from 1.2 percent of GDP in 2010 to 0.6 percent of GDP in 2017 (Statistics Lithuania, 2018). The ongoing reforms of consolidating secondary and tertiary education networks are aimed both at improving the quality and ensure the economical effectiveness of the national system of education.

However, substantial educational reforms towards more inclusiveness is being implemented in Lithuania. Lithuania highlighted the priority to promote changes in the educational systems, aimed at ensuring quality education for every learner, and creating a good school for all. Legislation on what has traditionally been conceptualised as special education has developed progressively over the past 30 years to reflect Lithuanian shift in its democratic and humanistic tradition and the resultant development of inclusive education as a quality education for all. This led

to creation of a decentralised system that passes responsibility for 'special schools' to municipalities, assuming that they will change into resource centres for other neighbourhood schools; the requirement for all schools to be made accessible to each child; the provision of funding and other resources, including teacher competence, to support students with special educational needs in regular schools.

Africa

Africa, Sub-Saharan Africa in particular, was the last part of the world where mass systems of public education were established. In most parts of Sub-Saharan Africa, institutions of formal education, i.e. schools, were established for the first time by nineteenth century missionaries from Europe. In the early twentieth century colonial governments too got involved in the supply of education. However, by the end of the colonial era, education was still very sparsely supplied, and of low quality. After the attainment of independence (c. 1960) African governments embarked on an impressive education expansion drive. In the post-1990 context the private education sector was given space and took off. While enrolments in the public education sector increased unabatedly, the reduced availability of funds meant that quality of education deteriorated.

South Africa

South Africa underwent a socio-political reconstruction comparable though not identical to the rest of Africa, but with a time lag: 1994 in the case of South Africa, around 1960 for most other countries in Africa. Furthermore South Africa had to make this change within the parameters set by the neo-liberal economic revolution. While South Africa had in 1994 enrolment rations significant higher than the rest of Africa, education was unequally supplied, and deemed to be too authoritarian (i.e. teacher-centered) (cf. Wolhuter, 1998; 1999). The ground pillars of post-1994 education change were democratization, multiculturalism, decentralisation and desegregation (Wolhuter, 1999). Integral to these pillars were the advancement of a learner-centered, inclusive education system, built on the principles of inclusion and social justice. The specific purpose of an inclusive education system is to provide equal access and quality education to all children (Nel, 2018). Furthermore a change was effected from content-based education to outcomes-based education (Ibid.), which, currently, after several reviews, reverted back to a more content-driven education approach again (Booysen, 2018).

Teacher education

Globally

Three global trends in teacher education are evident. Firstly, there is a drift from teacher training colleges to universities being tasked with teacher education. Secondly, there is an increase in the duration of teacher education, with Finland and the European Union and in its slipstream all countries which joined the Bologna process, of requiring a Master's degree (or five years of university study) for teachers at (at least in senior) secondary schools. A third trend, lying at odds with the first two which suggests more rigorous teacher education, but in line with the neo-liberal economic revolution, is that teacher education programmes is no longer conceptualized as only equipping students with a series of measurable skills or techniques (much akin to the training of technical apprentices), rather than educating

students to think critically through the study of academic/theoretical foundations (Schweisfurth, 1999).

Lithuania

In Lithuania, post-1990 teacher education reforms were characterized by a deideologization and internationalization. One part of this was the introduction of new subjects such as Philosophy of Education and Comparative Education in teacher education programmes; a road out of the isolation and inward lookingness of the Soviet era, and of embracing the wider world. Teacher education takes place at universities and colleges, and the Bologna process is evident in shaping teacher education. The decrease of school-age population in the country is both a challenge and an opportunity for a teacher training system. On one hand, limited demand for new teachers leads to a reduction of governmental grants for teacher training studies and closing down of teacher training institutions/study programs. On the other hand, decrease in quantity of students provides better opportunities of upgrading the level of studies. For example, the decrease in enrolments of student teachers makes possible consideration being given to upgrade the minimum qualification required of teachers being a Master's degree.

Lithuania highlighted the priority to promote changes to ensure quality of teacher education. It requires that educators and education support professionals have appropriate competences and are ready to work in the rapidly changing innovative school. Changes within education system are closely related to educational paradigm shift from teaching to learning and collaboration-based learning. In Lithuania, in order to recruit relevant resources, including expertise and competencies, for quality teacher education three university 'teacher education centres' have been appointed. Innovative teacher education increasingly focuses to innovative education of creative and able to critically think prospective teachers and teacher educators and to already practicing teachers as well as to the learners and their changing needs at school.

South Africa

Due to demographics and political factors, the first post-1994 years necessitated a reduction of teacher education enrolments. During the years up to 1994 the number of teacher training colleges were exponentially increased, inter alia as part of an exercise by the then governments to win "the hearts and minds" of Black South Africans. The surplus of teacher education capacity made the phasing out of teacher training colleges easier, and making universities the sole site of teacher education, meaning with Namibia, South Africa is now the only country in Africa where a university degree is the minimum requirement for new teachers. Tying in with the pragmatic swing in teacher education reform worldwide, related to neo-liberal economics, but in the case of South Africa more motivated as statement against an inherited system of education deemed to be too authoritarian, the change to outcomes based education brought about a major change in teacher education programmes as from 2002, where seven roles teachers are expected to play formed the basis of the curricula. However, in the aftermath of the failure of outcomes-based education, within the realities of the South African context, the latest directive for teacher education programmes (Department of Basic Education, 2015) signal a return to the basic disciplines of Foundations of Education and Content Pedagogy.

Furthermore, an integral requirement of the current teacher education policy is that student teachers must attain a pedagogical competency to accommodate diverse learning needs in one classroom.

Conclusion

The employment of Eastern Europe since the fall of the Berlin Wall as a (temporal-spatial) taxon in Comparative and International Education is not without merit, but the merit thereof has its limits. The developments of teacher education in post-1989 Lithuania, shows that such developments were affected by factors common to post-1989 Eastern Europe, such as deideologisation of education. On the other hand such teacher education developments were also shaped by global forces (such as the neo-liberal economic revolution, which affected education and teacher education globally). Secondly, the triumph of the Western liberal model, which followed the fall of the Berlin Wall, had a sudden forceful effect on education in parts of the world other than Eastern Europe too, as the example of South Africa shows. Lastly, the comparison of Lithuanian with South African teacher education post-1989 reforms show that national contextual factors too have played their part in shaping education developments.

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The Collapse of the Berlin Wall in 1989: A Historical Turning Point for South Africa, with Reference to Religion / Religious Education

Abstract

The study reported in this paper centred on the question whether the fall of the Berlin Wall in 1989 had any effect on the status of religion / religious education in South Africa. Although South Africa is geographically far removed from Eastern Europe, the socio-political situation in South Africa was deeply affected by the fall of the Wall, particularly by the subsequent collapse of the Soviet Union. One of the upshots of the socio-political reform in South Africa after 1994 was that religion / religious education was relegated away from the public school to the private sphere of the parental home and religious institutions. This policy shift, however, might have had negative effects on the general social morality of South Africans.

Keywords: religion / religious education, South Africa, collapse of Communism, social space, morality

Introduction and problem statement

The focus in this paper is on the status of religion / religious education in a country situated at the southernmost tip of the African continent that despite the geographical distance from Eastern Europe also has felt the repercussions of the fall of the Berlin Wall in 1989 and particularly by the subsequent collapse of the Union of Socialist Soviet Republics (USSR).

The research reported below revolved around the following research question: How and to what extent has the collapse of the Berlin Wall and subsequently of the USSR affected the status of religion / religious education in South Africa?

The fall of the Wall: a turning point in the history of South Africa

Obama (2018), in his address at the Nelson Mandela anniversary celebrations in 2018, correctly stated that no part of the world had been left unaffected by the fall of the Wall and the collapse of the USSR. According to him, "it seemed as if the forces of progress were on the march, that they were inexorable". During the last decades of the 20th century, he continued,

> ... from Europe, to Africa, Latin America, Southeast Asia, dictatorships began to give way to democracies. The march was on. A respect for human rights and the rule of law, enumerated in a Declaration by the United Nations, became the guiding norm for the majority of nations, even where the reality fell far short of the ideal.

The march of the forces of socio-political reform was on also in and for South Africa after 1989. That which transpired in Eastern Europe contributed to momentous socio-political changes in South Africa after that date. The fall of the

Wall and the collapse of the USSR signalled a momentous turning point in the history of South Africa in that it cleared the way for the advent of full democracy.

Conceptual and theoretical framework

The investigation reported in this paper centred on the following two key concepts: "the fall of the Berlin wall in 1989 as a historical turning point for South Africa" and "religion / religious education". These concepts respectively refer to the following.

After the fall of the USSR, the leaders of the pre-1994 apartheid regime in South Africa saw their way clear to begin negotiations with the leaders of the black majority in the population. They were convinced that the threat of a communist take-over in South Africa had dissipated as a result of the USSR's demise, and that Western-type democracy would prevail after negotiations for a new political dispensation. The fall of the Wall was a double-edged sword for the South African government, however. On the one hand, fear of a communist take-over had largely vanished. De Klerk referred to the fall of the Wall and of the USSR as a "God-given opportunity" and reassured his followers that the African National Congress (ANC) would receive no more support from the Soviet Union during the ensuing negotiations about the future of South Africa (Pretorius, 2012, p. 415). On the other hand, it rendered the "apartheid" government's opposition to communism old-fashioned, thereby depriving the government from its strongest argument why Western powers should pressurise the ANC into accepting power-sharing (Giliomee & Mbenga, 2007, pp. 394-395).

The term "religion / religious education" refers to two entities, namely a *confessional* approach to the teaching of all the school subjects but more specifically to instruction in specific religions, and also to religious observances during the normal school day, such as religious holidays, opening the school term with reading from holy scriptures and prayer during assembly, and opening and closing the school day in the same manner. Both these aspects of religion / religious education underwent changes in South Africa in the post-1989 period.

Several theories come into contention when searching for a theoretical lens through which to view the problematic of this paper: complexity theory, social capital theory, ecological systems theory, the cultural-historical action theory and action theory. The choice fell on *the social space and ethical / moral function theory* as developed by Van der Walt and others (2017(a) footnote 5; 2017(b); 2017(c); 2017(d); Van der Walt, 2018; Andresen & Van der Walt, 2018; Van der Walt & Wolhuter, 2018). This theory was found to be appropriate because it hinges on two ideas that are central to this investigation, namely that events occur in particular *social spaces* (in this case, the socio-political space referred to as "South Africa" and the pedagogical space referred to as "a school") and that occurrences in such spaces always raise questions about whether the role-players in a particular space demonstrated a sense of *moral awareness, consciousness and direction*.

Space can be defined as the situation in which an institution and its relationships are physically located in the real world (Verburg, 2015, p. 420), in this case, South Africa. Other modalities of social life such as the ethical / moral also exist and resultantly cohere with the modality of space (Strauss, 2009, p. 763). Each societal relationship has been entrusted with a unique mandate, function, calling and purpose

in the modern differentiated society, and is supposed to discharge its function and purpose with a sense of responsibility and accountability. "Responsibility and accountability" refer to the ethical / moral dimension of its function in society. The actions and behaviour of the societal relationship as agent in its social space should be ethically / morally acceptable. This, according to Strauss (2009, p. 763), is what is referred to as social morality: the showing of the necessary respect in the course of social interaction. Each participant or agent in the social space should demonstrate care for the interests of all other people and the groups they belong to. Justice, fairness, respect for others and care are closely related to caring for others and their interests. According to UNESCO (2015, p. 24), the application of this norm or principle could lead to a better world characterised by peaceful and ethical actions and behaviour. Koonce's (2018, pp. 101, 105, 108, 111) outline of an ethic of caring in which she follows Noddings (2003, p. 24) chimes with the above, namely that it is an approach to other people from a position of critically caring, sympathy, empathy, the creation of mutual respect and understanding, thereby creating a safe and caring atmosphere and a strengthening of relationships and reciprocity. The discussion below pertains to the status of religion / religious education in the social space referred to as schools in South Africa, and particularly to the repercussions for the social morality of South Africans flowing from post-1994 policy regarding religion / religious education in schools.

Socio-political conditions and developments in South Africa before and after the fall of the Wall

The pre-1994 Constitution of South Africa (1948-1994) stipulated that the state should control and manage education for Whites. (Education for blacks, coloureds and Asians was provided, financed and controlled by missionaries and other non-governmental organisations.) Education for the White section of the population was regulated by the Act on National Education Policy of 1967 (Act 39 of 1967). The Act stipulated, in line with the Constitution, that education for White South Africans "should possess a Christian and a broadly defined national character" (Barnard, 1976, p. 8). It embodied the Christian education ideals and aspirations of the white Afrikaner population of South Africa (Whites or so-called Europeans; note: not including the so-called coloured Afrikaans speaking section of the population). The Act terminated the previous system of divided control of education; education / schooling for Whites was centralized and managed by the Minister of Education (Barnard & Coetzee, 1975, p. 179; Barnard, 1979, p. 140). Education for the other population groups was managed by separate Departments of Education. No form of religion / religious education was legally enforced by any of these other ("non-White") Departments.

The 1967 Act for Whites stipulated in Article 2(1)(a) that "education in schools maintained, managed and controlled by a State Department (including a provincial department of education) should display a Christian character, but the religious convictions of the parents and the learners should be respected as far as religious education / instruction and religious observations are concerned". Those sections of the White South African populace that were not content with this arrangement could establish, manage, control and maintain schools in line with their own views (Bingle, 1970, p. 26).

The approach to education described above did not appeal to the non-White population. For them, this approach was yet another demonstration of how apartheid was practised. The White community was accused of using Christianity (Calvinism) as "a reinforcing mechanism to the apartheid creed" (Christie & Collins, 1984, p. 161).

The move to Bantu Education based on the Bantu Education Act of 1953 therefore was opposed by the non-Afrikaner segment of the population, particularly by the English-speaking missionaries who controlled and owned the black schools. Following the passing of this Act in 1953, those ex-mission institutions which had not been closed during the transfer of control to the State were put under the control of principals and teachers who were committed to the ideologies of apartheid and Christian National Education (CNE) (Hartshorne, 1993, p. 197). The Christian ideals of an egalitarian and communal society, in which everyone aspired to a common culture which was both Western and Christian, were struck a severe blow (Christie & Collins, 1984, p. 162). While the syllabuses (of the different school, college and university subjects) as such allowed alternative interpretations, both the textbooks of this period and the teachers were strongly biased toward the CNE approach, according to Hartshorne (1993, p. 243).

Then came the historical turning point signalled by the fall of the Berlin Wall. Following the struggle against apartheid and after long negotiations, the new fully democratic South Africa was born. The advent of the new dispensation in 1994 also brought a new approach to religious education / religion and education. A new policy in this regard was expected in view of the stipulations in Chapter 2 (The Manifesto of Human Rights) of the new Constitution of the Republic of South Africa promulgated in 1996. Deliberations about religion / religious education in schools took nearly a decade after the birth of the new socio-political dispensation. The *National Policy on Religion and Education* was promulgated only in 2003. The Policy currently regulates three aspects of religion / religious education: (a) Religion Education as a normal school subject (§17-53); (b) Religious Instruction (§54-57), which comes down to comparative teaching *about* religions; and (c) Religious observances (§58-65), which were to be observed equitably and equally.

Discussion and conclusion

South Africa has indeed felt the consequences of the fall of the Berlin Wall in 1989 and the subsequent collapse of the USSR. In part, this can be explained by the fact that South Africa forms part of a globalised, inter- and transnational world.

The problem for the post-1994 legislator in South Africa was, as Lisovskaya (2018, p. 312) asked with respect to the situation in post-1989 Russia: "… how does one bring religion … into the school of a constitutionally secular state? And how can this be accomplished in a multi-ethnic and multi-confessional society in such a way that minority rights are not violated?". As noted above, the South African legislator responded to these questions with the promulgation of the *National Policy on Religion* in 2003.

Based on developments in South Africa after 2003, one could speak of a double-sided coin regarding the place of religion / religious education in South African public schools. On the one hand, the answer must be favourable: a more socially just and equitable dispensation was inaugurated in schools after 1994, and the task of

providing confessional religious education since then has fallen where it arguably belongs, namely with the parents and the religious institutions such as churches. On the other hand, the answer must be somewhat negative: since confessional religion education has been privatised and is now out of the public arena, it is uncertain to what extent this form of education is still being provided by the parents and religious institutions, and how effective their instruction has been. There are signs that this important facet of education has been neglected, a circumstance that might have been playing into the hands of secularism (the distancing of South Africans from all forms of religion and hence from the mores [ethics and morals] that flow from religious commitment). The new *Policy on Religion* of 2003 arguably also has led to a de facto divide between the state (school) and confessional forms of religion (cf. Swamy, Paluri & Koshy, 2017, p. 4).

South Africa as a *socio-political space* has come up with a workable solution that provides a place for comparative religion / religious education, religion studies as a regular school subject and for religious observances in schools. However, the banning of *confessional* religion / religious education from the public schools remains a cause of concern. Its removal from the public school might have had negative consequences for the ethical / moral behaviour of the general population. The moral base of South African society has clearly deteriorated in the last two decades: increased anomie, widespread corruption, xenophobia, service delivery uprisings, rioting, xenophobia, strikes, an increase in crime and a general lack of social capital are the order of the day.

Thompson (2018, p. 11) correctly observed that the values that people live by are intrinsically linked to broader philosophical and religious questions. This is particularly important in a multicultural and complex social space such as South Africa where people are constantly confronted with the relativity of moral judgements (Thompson, 2017, p. 242). He (Thompson, 2018, p. 192) goes so far as to remind us of Nietzsche's challenge: in the absence of God (who might have provided a fixed set of values), by what criterion can one judge what is right? The deprivation of many children from exposure to confessional religion-based values might have been the cause of much of the social laxity that South Africa is currently experiencing. As far back as 1997, former South African President Nelson Mandela spoke about the role of religion in nation-building and the need for religious institutions to work with the state to overcome the "spiritual malaise" underpinning the crime problem. In 1998, he repeated this message with emphasis on the symptoms of the moral depravity that South Africa was suffering from (Moral Regeneration Movement, 2018). If anything, the moral decadence has increased since then, as evidenced by the work of several commissions of inquiry. A case could indeed be made for a return to *confessional* religious instruction in all schools in South Africa.

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Kosovo Education in the 21st Century: A Challenging Future

Abstract

Kosovo's educational system lies at the nexus of complex historical circumstances, the influence of transnational organizations, and local imperatives. With the collapse of Yugoslavia, the political and ethnic tensions played out on an international scale and in the day-to-day lives of Kosovo's citizens. At the end of the second decade since the cessation of hostilities changes have come to the system, but these appear to be fragile and the sustainability of the changes are uncertain. Europe has diminished its role in the change. Some elements of self-determination have emerged with Kosovo in discussions with Serbia on substantial national issues, but progress remains elusive. Balkan states are often regarded as countries in transition. What remains to be resolved is the engagement of decision-makers in development of education. Rather than a political arena, essential for Kosovo is the creation of a professional system to support learning and development through increased financial investments, commitments to quality and resources for education.

Keywords: Kosovo, educational reform, parallel systems, system reconstruction

Introduction

Kosovo's educational system experienced two unique events. The first was the dismissal of Albanian speakers in 1989 from schools and agencies throughout Kosovo and their replacement by Serbian officials (Shahani, 2016). The second, a direct response to the dismissals, was the development of a parallel educational system to continue Albanian-based education in 1992. These two powerful social and political events changed the course of history in Kosovo. This paper begins at the start of the 20th century to establish the context for these events. Divided into three periods, the first period describes the schools prior to breakup of the Socialist Federal Republic of Yugoslavia, the second period describes the breakup of Yugoslavia in 1992 through the end of the Kosovo War in 1999. The third period addresses the current and anticipated educational reforms of the 21st century. The focus of the 21st century discussion is on the implementation of the primary and secondary educational system under the Ministry of Education, Science and Technology. The paper only touches on the complex nature of Serbian supported schools located within Kosovo. Other important and related topics including the education of minorities, women, and students with disabilities, which deserve recognition and treatment, are beyond the scope of the paper.

Kosovo education from 1900 to 1992: The context

Kosovo's educational history is intertwined with the historical clashes in the region. To understand current Kosovo education since the fall of the Berlin Wall or

more importantly the death of Tito, we begin at the start of the 20th century. The end of Ottoman empire's four-hundred-year rule of Kosovo in 1912 (Hall, 1994) was followed by turbulent phases. The first Balkan war seeded a divided Kosovo territory to Serbia, Bulgaria, Montenegro and Greece but disputes led to a second Balkan war with the result that Kosovo was partitioned between Serbia and Montenegro. The end of World War I saw the territory incorporated into the Kingdom of the Serbs, Croats, and Slovenes (later named Yugoslavia). During World War II Kosovo was occupied by Fascist Italy. Nazi Germany forces supplanted Italy's occupation toward the end of the war and were themselves replaced by the Yugoslavian Partisans under Josip Broz Tito.

Kosovo's education system followed this turbulent path. Schools under the Ottoman Empire were mostly religious schools and opened to Kosovar-Albanians. (Kosovar is used for individuals living in the Kosovo region. For references to specific ethnic groups within the country a hyphenated form of Kosovar-Serbian or Kosovar-Albanian will be used in the paper.) After 1912 and the end of Ottoman rule, Serbian primary and secondary schools were instituted. Occupation by Bulgaria of Pristina in 1916 banned Albanian language schools although areas under Austro-Hungarian rule did permit Albanian language schools to open. During the period of 1919 to 1939 in Yugoslavia, all Albanian-language schools were closed and education was in Serbo-Croatian. Kosovar-Albanian students who attended schools were mostly males with few Islamic women in attendance.

Education took an inclusive turn with Kosovo's occupation by Italy during the Second World War with Albanian language schools again opening in the region. This continued with hundreds of primary schools opened and the first Albanian language high school began in Pristina. At the end of World War II, Kosovo became part of Yugoslavia and Albanian was recognized as a language and an ethnic minority. Primary schools taught Albanian, but high schools were Serbo-Croatian medium schools. 1968 saw increased opportunities available for Albanian language students at all school levels, including the opening of the Albanian language University of Prishtina in 1970.

In 1974 Kosovo was granted greater self-government through revisions in the Yugoslavian constitution including the provision that Albanian could be taught at all levels. As an autonomous region of Serbia, Kosovo now held many of the same rights as the republics of Yugoslavia. The end of the 1970s reforms led to an educational system that offered basic education to all members of society regardless of ethnic origin or religious beliefs. These advances were to be reversed in the 1980-1990s.

After Tito's death in 1980, there was an increase in instability among the six republics of the federation, the economic situation was in decline and in 1981, the University of Prishtina of almost 50,000 students now was 75 per cent ethnic Albanians. It became a focal point for Kosovar Albanian's increasing demands to be a recognized member as a republic rather than an autonomous region of Serbia. In 1981, the Kosovo upheaval, known as the Student Protests of 1981, was initiated at the university and violently repressed by the government.

The Yugoslavian response to unrest was to begin to strip what was considered Albanian influence from the university and the province. To begin, Albanian materials were banned and replaced by materials from Yugoslavia; then professors

and students involved in the unrest were removed from the schools. These efforts began a pattern of repression that escalated over the decade and led to the rise of Slobodan Milošević who gained power by dwelling on ethnic differences and fomenting the Serbian minority in Kosovo. Kosovar-Serbians mounting concern of their loss of status in Kosovo and Milošević's rise to power led to the concentration of power in Belgrade of all elements of government including education. The university was under attack as a hotbed of Albanian nationalism and Serbian response was draconian.

Kosovo's autonomy was terminated by Milošević in 1989. Kosovar-Albanian state employees were removed from their positions and replaced by Serbian personnel. Kosovo education was further transformed with Serbo-Croatian as a required subject and a focus on Serbian history and culture in secondary schools. Serbo-Croatian became the language of instruction at the university as well. Kosovar-Albanians responded with a shadow government and non-violent protests (U.S. State Dept., 2018).

The parallel education system and social fragmentation: 1992-2000

Kosovar-Albanians established a parallel education system as a response to the curriculum changes and dismissal of Albanian language instructors. Created during the early 1990s the success of the alternative schools can be seen in the 300,000 to 450,000 students attending parallel Albanian-language schools set up in Mosques, homes and garages (Shahani, 2016; Gashi, 2017). Discussions between the government and Kosovo activists led by Ibrahim Rugova resulted in agreements intended to bring Albanian students back to the classroom. The Serbian regime allowed some of the elementary schools to work in their buildings to create the impression that the basic rights of Kosovar-Albanians were respected. But even in these schools the students were segregated with walls or shifts (one shift Albanians, one shift Serbs). The Kosovar-Serbian teachers and students protested this arrangement.

Resistance to the government through passive means did not satisfy many Kosovar-Albanians believing that the strategy had not gain the goals of the people. Armed conflict had occurred sporadically from the 1980's but in 1997 the Kosovo Liberation Army (KLA) formed as an armed resistance increasing attacks on police and military targets in Kosovo. The KLA's stated goal was to create an independent Kosovo state (U.S. State Dept., 2018).

Retaliation by the government under Milosevic against the KLA was unleashed accompanied by wide-spread civilian casualties and human rights violations. A plan was brokered by NATO called the Rambouillet Accords to end the violence, repatriate refugees and internally displaced persons, and create a self-governing entity in Kosovo until a final agreement was reached. Serbia and Russia would not sign off on the agreement which precipitated a bombing campaign in support of the KLA. Massive displacement of Kosovar-Albanian occurred through ethnic cleansing with estimates of well over a million refugees from the war and forced migration (Suhrke et al., 2001). The bombing of Serbian positions lasted 78 days until Serbia agreed to a political process. Kosovo was placed in a protected status administered by the United Nations. Governmental structures were created to govern the area and Kosovar-Albanians were integrated into the new administration.

Along with the displacement of families, over 50% of schools were damaged or destroy in Kosovo (UNHRC, 1999). As ethnic Kosovar-Albanians returned to their homes, reprisal killings and abductions of ethnic Serbs, Roma and Albanians considered informants occurred. Thousands fled from their homes during the latter half of 1999, and many Serbs, Roma and other minorities remain displaced to this day.

Building the system for the 21st century

The war's impact on the education system in Kosovo was devastating. With fifty percent of the schools damaged or destroyed and textbooks, equipment and facilities vandalized, rebuilding was the order of the day. The schools, like most governmental agencies, had little or no leadership. The Ministry of Education, Science and Technology was established in 2002 to oversee public education in Kosovo, while municipal departments of education departments as intermediaries between schools and the ministry followed. The reconstruction of school property was daunting, but it was not the critical issue faced by the UN and donor nations. The issue was how to support and assure a transition of Kosovo to a European oriented, democratic and unified country.

Education had been used both as a tool of the state and a weapon of the resistance before the war. Textbooks, language, employment and access were state strategies to privilege Serbian communities. Parallel education systems and political education were strategies of resistance of the Albanian population. The United Nations was faced with systems steeped in politics, outdated methods of instruction and strategies that precluded minority communities, women and the handicapped. Michael Daxner, the education director for UNMIK charged with reconstruction and reforming education invited outside consultants to establish an educational system from the ground up. Imbued with substantial power and significant funding, he made major changes in the system. This first attempt reached some goals proposed by UNMIK and supported locally but left the system in transition rather than modernized. This situation was not limited to Kosovo, but endemic throughout Eastern Europe and former socialist countries (Chankseliani & Silova, 2018). When the director left Kosovo, his parting words were scathing and indicted both local and international communities.

> One observer interviewed characterized [Daxner's speech] it as "a blistering indictment of the deficiencies of Kosovo education" which blasted the system's methodological backwardness, fixation on using education maintain ethnic identity, ingrained sexism, rampant corruption, and the believe that paying lip service to "European standards" would somehow bring them to pass in Kosovo. The observer also noted that Daxner "lashed into" international donors for decreasing funding for Kosovo education at the moment when investments called for reinforcement.

His efforts reconstructed and reformed the system in a few years. The limitations of this strategy were the disenfranchisement of local communities and disassociation of the local experts and families. While many of the educators in Kosovo thought that developing a European-based education system was essential they recognized they were being marginalized in their own country (Sommer & Buckland, 2004). At the close of the first decade of the 21st century, and the first

decade of Kosovo's separation from Serbia, many changes had been undertaken and successes could be measured, but their value and permanency remained uncertain.

In 2008, Kosovo could revel in its proclaimed independence as a country and its progress but begin to reflect on its limited and sometime ephemeral advances. This was particularly true in education. There were criticisms of the capacity of the system to make changes, UNMIK unilateralism and focus on European integration, wide-spread corruption in primary, secondary and post-secondary education, segregated school systems and limited funding for schools as well as extreme variance in performance between rural and urban schools. Kosovo reflected many of the issues facing Eastern European countries moving from semi-planned economies to market economies (Chankseliani & Silova, 2018). What was unique to Kosovo was that it had no history as an independent state. The traditions of other countries in the Socialist Federal Republic of Yugoslavia as independent states were not those of Kosovo which had the experience of autonomy, but not independence.

The second decade of the 21st century saw a restarting and refocusing of efforts in curriculum, teacher training and text materials. This occurred within the supportive if directive non-governmental organizations (NGO) and consultants supplied by western European counties and other donors. Governments and NGOs funded graduate education abroad for potential leaders, foreign curriculum development consultants in subject areas, specialized programs in law, civic and democratic development and advisors in test development and administration. Internally Kosovo saw significant turnover in the leadership of MEST and a series of redirections of effort as priorities changed with successive Ministers.

In a 2004 (Sommers & Buckland) report other concerns were raised by consultants that were prescient. As noted in the report:

> *Core education system responsibilities were outsourced to international actors under the Lead Agency framework. But was the education system develop through this process? On paper, results arising from the Lead Agency framework are in evidence, sometimes impressively so. However, it remains unclear whether UNMIKs early reforms will ultimately manifest themselves as demonstratable and lasting changes at the level of schools and classrooms.* (p. 145)

These changes were occurring when neoliberal models of improvement had been sweeping over Eastern Europe with reforms and educational change marked by outcome measures, western-oriented systems, and comparative analysis. Substantial effort to integrate the Balkan countries into a European model was at the forefront of reform. This gave Kosovo a direction for development but with challenges related to limited resources, cultural context, education vision and unresolved ethnic conflicts that continue to influence the educational enterprise to this day.

After the declaration of Kosovo's independence, the government under a new minister of education decided to change the Pre-University Curriculum Framework after the first Framework of Curriculum was drafted in 2001. The drafting of the new documents began in 2009 and were finalized in 2011. Changes were not based on preliminary research and analysis; the justifications were political so that a new initiative could be proclaimed. While the new curriculum developed student competencies in line with European goals, no discussion with teachers and schools to get suggestions or explain of the rationale were included in the changes. The new curriculum and related methodologies require increased collaborative process and

teaches the students roles of citizens in a democratic system. However, the lack of collaboration, training and communication created many problems and challenges in implementing the curriculum in schools. In this case, educational processes were held captive to political decisions. Changes occurred without prior consultation with experts and teachers who carry the day-to-day challenge of implementation. After implementation beginning in 2016, teachers also voiced their frustration with the lack of textbooks to teach the new curriculum. As a clear example of inadequate planning and top-down decision making, textbooks may not be available until the 2019-2020 academic year.

Likewise, the various projects and programs, not few in number, by the international community, have failed to influence or fundamentally change the state of education. These projects often do not comply with the real requirements of the Kosovo education system. Some of these programs have been designed without effective coordination with the local community and are often replications of programs in other countries that do not reflect the Kosovo context. Both international and local individuals who influence the implementation of these projects have benefited from their execution. This has meant that for many investments success is not the expected outcome.

Another critical remaining challenge is the engagement of the Serbian community. Kosovar-Serbs refused to be part of the education system that was reestablished in 1999 after the end of the conflict. Instead, the Kosovar-Serbs work with the programs (curricula) that are designed in Serbia and use Serbian textbooks. In a way, this is permitted with the Ahtisaari Package, if they are not in conflict with the Constitution of Kosovo. There was attempts for Kosovo Serbs to be included in the Kosovo education system, but they have come to an end without success. Political tensions that happened from time to time made the integration of Kosovar-Serbian schools into the Kosovo education system problematic. Political decisions have created and maintained two systems of education in the country (ECMI, 2018) with one managed by the national government while others managed by Serbian communities and supported by Serbia. While examples of multi-lingual schools including Albanian, Serbian and English instruction for all children exist, these are exceptions, however they do point to a possible model for the future. Currently, there is little discussion or development of strategies to increase these dual or tri-language schools. Other communities, such as Turks, Bosnians, Roma etc., are more effectively integrated into the Kosovo education system and work with programs drafted by the Ministry of Education. Without movement to address the concerns of the Kosovar-Serbian community, integration of populations remains on the distant horizon.

Conclusion: Looking to the future – opportunities and impediments

Kosovo's educational system lies at the nexus of complex historical circumstances, the influence of transnational organizations, and local imperatives. With the collapse of Yugoslavia, the political and ethnic tensions played out on an international scale and in the day-to-day lives of Kosovo's citizens. At the end of the second decade since the end of hostilities changes have come to the system, but these appear to be fragile and the sustainability of the changes are uncertain. Europe has diminished its role in the process. Some elements of self-determination have

emerged with Kosovo in discussions with Serbia on substantial national issues, but progress remains elusive. Balkan states are often regarded as countries in transition. The question has been: How long will it take for a democracy to emerge? This may be the wrong question and the wrong expectation. Perhaps the goal should be self-determination and the outcome reflect the complex and diverse country. New leadership may have to emerge, and new partnerships forged before much of this comes to fruition. Education lies at the heart of this process. It is and will be both a mirror of the society and guide to its future. What remains to be resolved is the engagement of decision-makers in development of education. Rather than a political arena, essential is the creation of a professional system to support learning and development through increased financial investments, commitments to quality and resources for education as anticipated in "Kosovo Education Strategic Plan 2017-2021".

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The Rise and Fall of Autonomy. The Last Thirty Years of Hungarian Higher Education

Abstract

Although efforts were made to establish several higher education institutes in the Medieval era, Hungarian higher education began in 1635 when the first university, which is still in operation today, was founded. For the first one hundred and fifty years the university was under the influence of the church, then under Absolutism, it came under the rule of the Crown. The period between the last decades of the 19th century and World War I is considered the golden era of autonomy in Hungarian higher education, although the influence of the government was significant. After World War I the universities' autonomy decreased, and by the end of World War II, it had completely disappeared. The change came just before 1990 when the collapse of Soviet rule led to the fall of the Berlin Wall. In the early 1990s, the first independent and general Higher Education Act established the 'Humboldt model' in Hungary. However, this was only in place for three years. Over the past twenty years, we have seen the autonomy of Hungarian higher education and its institutions slowly decrease. This study discusses the past thirty years and aims to understand the reasons for the failure of the autonomy experiment.

Keywords: state control, HEI management, financial and educational efficiency of HEIs, history of Hungarian higher education's autonomy

Introduction

According to historical sources, during the early Medieval period, there were some experiments which aimed to establish universities or other types of higher education institution. Unfortunately, none of them was successful. The 16th century saw the emergence of Protestant colleges, but these were rather secondary schools and not higher education institutions, although later some of them went on to operate at the higher education level.

The first permanent university (University of Nagyszombat, later Royal Hungarian University, today Eötvös Lorand University) was founded by the cardinal Péter Pázmány in 1635. It operated under the auspices of the church until 1769 when the Queen brought it under her rule. It was a state university, which meant that the Royal Court wielded a great deal of influence. Less than ten years later, the first Hungarian Education Act was also adopted. The Ratio Educationis regulated the entire education system, from elementary school to university. The rules covered the organization, operation, and leadership of each type of education institutions and regulated the right and the obligatory of the teachers and the students as well. The Ratio Educationis was a masterpiece not only at the time but also established legal institutions that still exist today (Pukánszky, 1996; Kelemen, 2002), for instance, the division of management tasks between the rector and the senate, and the structure of the faculties. However, the Ratio Educationis declared the dual system of personal

leading, secured the direct influence for the Court with the help of the president. This system was existing until the fall of the Revolution of 1848-49 when the university management got under direct government leading. After the Austro-Hungarian Compromise of 1867, the sole management system was stabilized. Until of the breakout of the World War I the Ratio Educationis was in force, but its scope applied to only the Royal Hungarian University. The latter founded universities got own Act, but these legal norms offered the only framework. The detailed regulations of each university, including the rules of organization and operation as well as the rules of studying and exams, were regulated in ministerial decrees. It is obvious that at this time we could not talk about real autonomy.

There were two meaningful differences from the current situation. On the one hand, the Ministry involved the institutes to the regulations. For instance, the rules of organization and operation of the József Nádor University of Technology was prepared by the university for two years, the senate proposed the text of the rules and regulations, and the Ministry accepted this as much as possible (Batalka, 2007). On the other hand, the universities, and the rectors, as well as the senate, enjoyed such great respect still right before the breakout of the World War II that the government could not give through its many ideas because of the resistance of the universities (Ladányi, 2002).

The situation changed radically during and after World War II. The communist era introduced a uniform structure by partly following the examples of the Soviet Union. The new structure made possible such way of operation which secured the realisation of the Party's willing without barriers. Although the rules became less stringent at the end of the 1960s and beginning of the 1970s, there was no autonomy at all (Ádám, 1970).

Real change only came in the middle of the 1980s, but the autonomy would be declared only the democratic turn (Keczer, 2010). This paper presents the various stages of how autonomy was transformed: from the beginning, when there was full autonomy, until today, when it is present to a lesser extent.

Around the fall of the Wall

In the middle of the 1980s, it became clear that the rules were losing their grip on power. Gorbachev, the new Soviet leader, announced his new theories, which had an impact on the countries belonging to the Soviet sphere of influence. The Education Act of 1985 was not a democratic law, and it did not secure autonomy, however, at the time, it was a modern legal act. Moreover, this Act established a managerial and organizational structure which was implemented in the later democratic Acts in 1993 and 2005, and which was in the original version of the newest Act between 2011 and 2014. The legacy of this Act was therefore in place for almost thirty years (Polónyi, 2011).

However, in 1989 the republic was proclaimed, and the parliament adopted a number of amendments to the Constitution. The modified Constitution defined fundamental rights, including academic freedom, freedom of science and the autonomy of HEIs. After the first democratic elections, the new parliament modified this Act to make it more democratic. It then became the first Act to establish the autonomy of HEIs.

The golden era of autonomy

The Act on Higher Education in 1993 is important from several perspectives. This was the first law to regulate higher education independently. By separating public and higher education at the legislative level, lawmakers expressed their respect for higher education and the related fundamental rights. An additional noteworthy aspect is a return to the Humboldt model, which confirmed the essential role of academia in the management of HEIs (Polónyi, 2011). As academia and the legislators were enthusiastic because of the democratisation, they did not care about the newest trends in higher education. These aimed the implementation of professionalism besides the scientific rector (Bonaccorsi & Daraio, 2007). There was an increased demand for professional managers in HEIs, while the financial situation of the institutions was becoming more serious. Criticism came from the government and some authors as well. Much of this criticism was well-founded. However, the government, in particular, did not pay attention to the fact that Hungarian universities were blighted by several problems after the change of regime. The salary of the lecturers and researchers was extremely low, and the institutions were operating in extremely poor conditions (old equipment, plenty of buildings awaiting renovation, etc.).

The lack of necessary managerial skills led to catastrophic financial situations. Although various forms of European and overseas funding became available, they were not enough. There was not enough money to maintain the equipment, and the academic leaders were not effective managers. In 1996 the government turned to parliament, and the Act was comprehensively modified. Of the new rules, the most important was the legal norm which established the rector's responsibilities. This gave the government more control and led to a restriction in autonomy, but not to a significant extent. This clearer definition of managerial responsibility, however, was not accompanied by improved financial conditions and therefore higher education was not accorded significantly more money.

As usual, neither party was satisfied. The government did not acknowledge the outcome. Thus the institutions and their rectors were faced with not only a hopeless situation in many cases but also a greater degree of responsibility. According to an opinion in the literature, the government recognised the problems, but the responses were wrong (Prugberger, 1997).

Despite a lack of spectacular results, the regulations remained unchanged, although smaller modifications were made over a period of almost ten years.

Decreased autonomy, less responsibility

Under these circumstances, the entire higher education sector was waiting for a new law to solve the problems. Unfortunately, the 2005 Act led to disappointment. The government made errors in relation to the two most important elements of this act. Firstly, it introduced the Bologna process. This gave rise to passionate discussions and strong resistance. This issue is not the subject of this paper. However, it is worthy of note as this failure has had a significant impact on the judgement of the Bologna process among academics.

Secondly, the government tried to reform university management by introducing the governance body. Consisting of both internal and external members and granted

clear powers, this body was able to influence universities' work, as it was involved in the decision-making process. According to the majority of university leaders and the opposition in parliament (the current governing party), the powers of this governance body violated the institutions' autonomy. As the President of the Republic agreed, he referred the matter to the Constitutional Court, which then abolished this legal institute. The government tried to secure control and went on to establish the Financial Council to replace the governance body. The Financial Council does have the right to prior consent, although there is more emphasis on its role as an advisor.

Another change resulting from the new Act was a rethinking of the rules on responsibility. To avoid conflicts, the government ignored the previous rules on responsibility. Despite rulings of the Constitutional Court, the mere existence of the Financial Council resulted in the delimitation of autonomy, more than earlier it was imaginable (Keczer, 2007).

These rules put in place a new way of developing the organization of (state) HEIs. There was a clear trend, namely not to encourage HEIs to establish management models which would unite academic interests or increase professionalism and responsible management, but rather to create tools to increase the state's influence while minimising the responsibility of the leaders.

Neither autonomy, nor responsibility

When it was passed (2011), the current Act followed a well-trodden path. Although the government had indicated on several occasions that the financial management of state HEIs was ineffective, many of them still had operational difficulties. Nevertheless, the government placed more and more emphasis on the need for change. As expected, the parliament amended the Act immediately after the election in 2014 and established a new legal institute. The emergence of the chancellor's role radically reorganised the management structure. As a result, rectors were no longer the only ones responsible for each university; their powers were limited to the academic affairs and the chancellor became responsible for non-academic matters, such as finance, administration, and IT. This solution took the influence of the government to a level which had not existed since before the change in regime. Chancellors are chosen by the government; their employer is the minister, who can issue them with direct orders. With the chancellor's help, the government can directly influence the daily operations of state HEIs. One year later, the delimitation was further increased, when the government established the legal institute of the consistory. The consistory has prior consent like the Financial Council. However, there are several important differences. Firstly, with the exception of the rector, all its members are appointed by the government. As the minister also exercises employer rights over the rector, all of the consistory's members belong to the government, and they can be given orders. Secondly, prior consent of the consistory is not only connected to clear financial matters, such as budgets or financial reports, but also relates to academic affairs, such as medium-term institutional development plans (which include strategies for research, development, and innovation). With this authority, the consistory and therefore also the government can directly influence the educational and academic operations of HEIs. This means that the delimitation of autonomy has expanded from finance and

now also covers traditional academic activities (Crăciun & Mihut, 2017; Rónay, 2018).

Moreover, last year (2018), the government further tightened the limits on autonomy. Ignoring the clear ban outlined in the Fundamental Law, and using a dysfunctional rule in the Act on Higher Education, the government abolished Gender Studies programme by decree. Although no clear arguments were put forward, several pro-government personalities and newspapers attacked these programmes on two occasions (e.g. YCDA's proclamation; Ecker, 2018; Kroó, 2018). Firstly, they asserted that Gender Studies programme was incompatible with the expectations of a Christian State as well as the theory of supporting and unity of families; secondly, they stated that the effectiveness of this programme was not evidenced by labour market data (see State Secretary Rétvári). Some of them went as far as to declare that Gender Studies was not science (Ecker, 2018). All of these arguments need to be discussed by experts and representatives of the discipline. It is, of course, normal for the government to have an opinion on the topic. However, when a government decides to abolish a programme based on these arguments, it means that the government commits in scientific questions, which activity is strictly banned for the government in the Fundamental Law.

In the case of the Central European University (CEU), the government majority in parliament passed a bill, which created new conditions for universities with their headquarters abroad. The most important condition was an agreement between Hungary and the country to which the university belongs. The CEU, its hosting institute Bard College and New York State prepared this agreement and had detailed discussions with the government about it. The government did not declare to deny to sign the agreement. The government simply did not sign it without any argument. With this process, the government infringed the rules of Act on Higher Education and the requirements of the theory of good faith and honest (Bárd, 2018).

Conclusion

After this overview of the history of the autonomy of Hungarian HEIs, we can conclude that this kind of autonomy was never complete in Hungary. In itself, this fact is not surprising, as full autonomy does not exist anywhere in the world. The state is obliged to regulate and control the operation of HEIs, and this function inevitably restricts autonomy. The extent of autonomy also depends on historical and social conditions. Therefore, autonomy is continuously being shaped (De Groof, Švec & Neave, 1998).

Nevertheless, HEIs in more developed countries are able to increase the extent of their autonomy, develop autonomous operations, and take part in the government processes which target HEIs. In Hungary, we cannot see any trends developing. As this study has shown, the situation has moved in the same direction many times before, but at some point, the trend was reversed. Today, legislation is increasingly restricting autonomy, and, as the examples of the Gender Studies programmes and CEU show us, the same also applies to government action, i.e. the government is prepared to violate the law if it is in its interest and is able to turn a blind eye to academic freedom and autonomy.

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