

Education Provision to Every One: Comparing Perspectives from Around the World

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Preface

Nikolay Popov

Bulgarian Comparative Education Society: 25 Years of Being International

Thirty years ago: An important interview

Thirty years ago, in the spring of 1986, while writing my Master of Education graduation thesis on the history of Comparative Education, I had an interview with Prof. Gencho Piryov (1901-2001), one of the most prominent Bulgarian psychologists, who during his early academic years, in the 1920s and 1930s, was the most active comparativist in Bulgaria with more than 30 articles and 2 books in the field of Comparative Education. During the interview, Piryov told me about his first comparative studies, his visit to the International Institute, Teachers College, Columbia University, in 1926-1928, and his cooperation with such famous comparativists as Paul Monroe, Isaac Kandel, William Russell and others. At the end of the interview, I asked him: 'Prof. Piryov, could you please tell me what Comparative Education is for you?'. He smiled, thought for a moment and said: 'Comparative Education is my first love in science'. I was impressed by what passion, love and sentiment this 86-year old man was talking with about his 'first love in science'.

After that interview I decided to devote all my interests, time and efforts to the wonderful world of Comparative Education. And in the past 30 years Comparative Education has been my field of professional development, academic career, research, publications, international contacts, and all activities.

Twenty-five years ago: BCES establishment

Twenty-five years ago, at the beginning of 1991, I had active correspondence with Wolfgang Mitter, Raymond Ryba, and Erwin Epstein, who strongly encouraged me to initiate establishing a comparative education society in Bulgaria. Some months later, in October 1991, a small group of 12 people founded in Sofia the Bulgarian Comparative Education Society (BCES). Gencho Piryov was elected honorary member. Our aims were to contribute to the development of Comparative Education as a university discipline and research field in Bulgaria, and to become an integral part of the international comparative education community. In 1997, according to newly adopted higher education standards, Comparative Education was introduced as an obligatory discipline in all university teacher training programs. Five years later, those obligatory standards were abolished but despite that fact, since then Comparative Education has kept its position in the curricula of teacher training programs.

The BCES is very small. Regardless its size, the BCES performs a large number of activities and keeps close contacts with many foreign societies. In the past two decades the BCES has published or supported the publication of books on Comparative Education, Bulgarian education, and other topics. Organizing various events – roundtables, seminars, and conferences – is also among its activities.

The annual international conference is the BCES main event. The conference was organized for the first time in 2002 and since then it has been developed as an established, traditional and prestigious forum. The very large international scope is a typical feature of the conference. Colleagues from all continents every year come to this modest but high quality event.

This year's volume

Volume 14 of BCES Conference Books is published in 2 numbers. Number 1 of the volume contains papers submitted to the XIV Annual International Conference of the Bulgarian Comparative Education Society (BCES), held in Sofia, Bulgaria, 14 – 17 June 2016. Number 2 of the volume includes papers submitted to the IV International Partner Conference of the International Research Centre (IRC) ‘Scientific cooperation’, Rostov-on-Don, Russia. This partner conference has been organized as part of the BCES Conferences for the past four years.

The XIV BCES Conference theme is *Education Provision to Every One: Comparing Perspectives from Around the World*.

The book consists of an introductory chapter by Lynette Jacobs and 45 papers written by more than 70 authors. The papers are divided into 6 parts: 1) Comparative Education & History of Education; 2) Pre-Service and In-service Teacher Training & Learning and Teaching Styles; 3) Education Policy, Reforms & School Leadership; 4) Higher Education, Lifelong Learning & Social Inclusion; 5) Law and Education: Legislation and Inclusive Education, Child Protection & Human Rights Education; 6) Research Education: Developing Globally Competent Researchers for International and Interdisciplinary Research. The book also contains 14 abstracts of other papers.

May 2016

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Introduction

Lynette Jacobs

Education Provision to Everyone: Comparing Perspectives from Around the World

Abstract

The provision of relevant and meaningful education to all, particularly but not exclusively to marginalised groups and in challenging settings, is essential for better and sustainable futures. Although access in the first place implies that education must be provided physically to all children in schools across the world, such education must be meaningful. In this paper I ask the question: To what extent is education meaningfully provided to everyone? Following a literature study, I specifically look at the reality of access and progression in River State, Nigeria and in Lesotho. Many challenges exist, and I argue that Comparative Education provides the academic platform to study these, towards improving the situation.

Keywords: education provision, access, secondary schooling

Introduction

The provision of relevant and meaningful education to all, particularly but not exclusively to marginalised groups and in challenging settings, is essential for better and sustainable futures (Alikor, 2014; Hossain & Zeitlyn, 2010). Although access in the first place implies that education must be provided physically to all children in schools across the world, such education must be meaningful. Lewin (2007, p. 21) argues that access to education is only meaningful if it results in the following:

1. *Secure enrolment and regular attendance;*
2. *Progression through grades at appropriate ages;*
3. *Meaningful learning which has utility;*
4. *Reasonable chances of transition to lower secondary grades, especially where these are within the basic education cycle;*
5. *More rather than less equitable opportunities to learn for children from poorer households, especially girls, with less variation in quality between schools.*

While there are many commonalities, the education systems that are supposed to provide education in the different countries are influenced by settings and circumstances in different contexts. Education policies and practices and thus, also those that provide directives with regard to education provision are, in particular, influenced by local cultural, political, socio-economic, historical, geographical, demographical and religious factors, amongst other things (Steyn, 2015).

Over the past few decades, specific drives have supported education access and support for learners with particular barriers to learning (e.g. Salamanca Statement of

1994). While some barriers are the impediments within learners themselves (i.e. physical disabilities, limited intellectual abilities, sensory and neurological limitations, mental and other health problems, and so forth), other factors, such as unsafe and inadequate facilities, the curriculum, circumstances at home (such as poverty and illiterate parents), language barriers, cultural differences, war and conflict, and many other realities also prevent learners from making progress (Alikor, 2014; Jacobs, 2005; Ntlhokoe, 2013). Thus, when education provision is reflected upon, we need to recognise these external barriers in order to improve access, retention and success.

Findings from different countries

At the *Annual International Conference of the Bulgarian Comparative Education Society* aspects related to education provision are regularly reported on, and challenges are explained. Meral (2015) for instance, reported on the situation in Turkey where learners with intellectual disabilities are marginalised in special classes, even though the claim is made that there is one inclusive education system. In particular, a relatively small number of girls are found in special education settings, raising the question if this is really a case of “a higher prevalence of disabilities for male individuals, or due to the possible effect of cultural and religious factors as well as social indicators in Turkey” (Meral, 2015, p. 151).

Genova (2015) highlighted the gap between the performance of Bulgarian pupils and those in other European countries in the 2012 PISA, with Bulgarian pupils lagging behind on all indicators. This has the potential to negatively impact on their employability within the Eurozone countries. Furthermore, within Bulgaria, a significant difference exists between the performance of less privileged children and those of their more privileged peers – vulnerable groups were identified as “pupils from Turkish and Roma origins, and pupils from lower income families” (Genova, 2015, p. 189). Furthermore, it seems that one out of every seven children do not complete secondary education in Bulgaria.

Shej (2014) argued that a greater commitment and a stronger political will is needed in Mexico to combat child labour, and to eliminate other hindrances that prevent migrant children from completing school, and thus potentially breaking the cycle of poverty. To overcome sociological factors, such as the cultural level of parents, social class, gender and circumstances, such as unemployment, crime and marginality, dialogic learning implemented in learning communities was, based on his study in the context of Spain, proposed by Roblizo Colmenero (2014).

It is clear that in many countries meaningful education provision to all groups is still an elusive goal.

Focusing on access to secondary education

Many other studies worldwide, focus on access to primary education and access for learners with disabilities. While I acknowledge that this is essential, the reality is that in the current global context, progression and access to secondary and tertiary education is as important, particularly for breaking the cycle of poverty. Yet, access to secondary education is not guaranteed after primary school education. Al-Samarrai (2009) for instance, found that in Bangladesh, children from more affluent

households are twice as likely to enter secondary education than their poorer peers. In Kenya, fewer than half of the children enrolled for primary education reach secondary education, inter alia because they do not complete the primary education cycle (Lewin & Little, 2011). In Kosovo, a large number of Romani, Ashkali and Egyptian children in particular, do not complete school, and specifically girls from these groups often leave school prematurely (European Roma Rights Centre, 2011). Less than 50 percent of children in India reach grade 9 (Lewin & Little, 2011) and in South Africa just more than 40 percent of students who enrol in primary school education, successfully complete secondary school education (Engelbrecht, 2016). These findings are in line with the argument by Maharaj and Siyakwasi (2013, p. 217) that race, class and gender “prevent the lower classes from acquiring upward social mobility”. It is thus important to consider the state of the world, and in particular the situation in so-called developing countries, with regard to access and progression to, secondary education. In this paper, I specifically look at the situation in two parts of Africa, namely in River State, Nigeria and in Lesotho.

Rivers State in Nigeria

Rivers State is one of the 36 Nigerian states. It is situated at the southern tip of Nigeria, and its capital is Port Harcourt. It covers an area of approximately 21,850 km², has about three million inhabitants, and its economy largely depends on the oil industry. Large parts of the state are situated in the Delta area with typical mangrove swamps, while the rest can mainly be classified as being a tropical forest climatic zone (Wike, n.d.).

In Nigeria, the *Compulsory, Free Universal Basic Education Act* was enacted in 2004, with the aim of open access for the first nine years of schooling and thus ensuring appropriate levels of literacy, numeracy and life skills for all upcoming citizens. Alikor (2014) points out in her study that while this policy obliges the state to provide free primary education services in primary and junior secondary schools, with the financing of this being the joint responsibility of authorities at federal, state and local levels, it is the responsibility of parents and guardians to ensure that their children are “registered and attend and complete their schooling” (Alikor, 2014, pp. 83-84).

Rivers State has 23 local government areas, and while there are more than 2800 primary schools, there are fewer than 250 secondary schools. The secondary schools are situated mainly in and around the capital, as well as in the Local Government Areas (Wike, n.d.). Furthermore, empirical data collected in the Rivers State show, that while education opportunities are provided, the environment is not always conducive to teaching and learning (Alikor, 2014). Alikor’s mixed methods study amongst teachers, parents and students (between 12 and 19 years old) shows that schools are often understaffed, classrooms are overcrowded and because of the humid and hot conditions in the classrooms, students habitually do not pay attention. One teacher participant in this study pointed out the following out (Alikor, 2014, p. 118):

The environment is not conducive for both the staff and the students. I’m talking about my school presently because you can see the environment, when it is hot, you just cannot find comfort any place here ... the students are lacking concentration ...

most of them [the students] are always found at the gate wanting to be allowed out of the school premises ...

Furthermore, teacher resources are either lacking or outdated, and basic equipment, such as enough chairs for the learners to sit on, are in short supply (Alikor, 2014). Teachers and principals who took part in this study, indicated that the funding that is provided by the authorities are not enough to enable the implementation of free education to all learners. Contrary to the policy statements, parents are thus compelled to pay school fees, the feeding scheme is not working (learners are supposed to get three free meals a day) and teachers seem to believe that their salaries compare poorly with those in other Nigerian states, such as Lagos and Sokoto.

Even though teachers are well qualified and able to provide quality education, they struggle with large number of students in their classes, with less than twelve percent of the teachers who teach less than forty students at a time. One participant (Alikor, 2014, p. 119) explained that because of the widening of access to primary education, without expanding infrastructure, “the population of the school has greatly increased and is really affecting the classroom situation”.

Alikor (2014) found that there are a large number of students who do not progress to senior secondary school. While the participants were convinced that girls do not have equal access to basic education, many boys also do not complete their schooling. One participant pointed out (Alikor, 2014, pp. 119-120):

You will see most [boys] running up to become Boko Haram and that is what we are now experiencing in this nation. It's as a result of decision of these drop-outs.

From the above, it becomes clear that there are many factors that negatively affect success in the first nine years of schooling in Rivers State, Nigeria. The progression of learners to senior secondary school education becomes less likely, and for those that do, notably fewer secondary schools are available, thus restricting opportunities to complete the school path.

Lesotho

Very different from the River State in Nigeria, Lesotho is a small mountainous country in southern Africa (30 355 km²), landlocked by South Africa, and with the third highest average altitude in the world. It has a precarious ecosystem, with extremely cold winters, hot dry summers, very little natural fauna and flora and many parts are unproductive due to shallow soil and severe temperatures. It has just over 2 million inhabitants, with the lowlands being more densely populated than the highlands (Jacobs & Tlali, 2015).

Lesotho's education system is largely supported by Christian churches, where most schools have a particular church group as proprietor. The country is divided into 10 administrative districts (Jacobs & Tlali, 2015; Lerotholi, 2001). The *Free Primary Education* policy was launched in 2000, and similar to the situation in Nigeria, this opened up access for children. Education is free for the first seven years of schooling, causing the enrollments in primary schools to increase notably. However, specific challenges exist to continue with schooling after this; Ntlhokoe (2013, p. 3) views secondary education in Lesotho as one of the “most inaccessible systems in the world”.

In her qualitative study, Ntlhokoe (2013) found wanting an organised system to provide access and admission to junior secondary school in Lesotho. While parents apply to different schools, the majority struggle to secure admission for their children. One of the reasons for this situation is a problem with the administration of the application forms. Many applications do not reach the schools, and parents blame the primary teachers for this. Furthermore, there seems to be no clear directives from the education authorities on selection and admission, and feedback to parents. Schools seem to select the “best” learners, and do not give feedback to the parents of those who are not successful. Thus, parents often find out too late that their child has not been accepted at any school. Schools, particularly the minority of schools that are perceived to have good discipline and to obtain good results, receive numerous applications and can thus pick and choose. As one principal explained (Ntlhokoe, 2013, p. 60):

Our criterion is that we only admit learners who have obtained a first class pass within all the subjects.

On the other hand, schools that are perceived to be performing ineptly, keep on admitting learners who performed badly in primary school, thus sustaining the cycle of poor performance. One principal expressed the frustration that comes with this, as follows (Ntlhokoe, 2013, p. 60):

The disadvantage is that we admit weak learners who have only passed three subjects who are quite weak. Sometimes we admit learners who scored F in English. This is problematic because at secondary schools, English is a medium of instruction. In Form E [the final year of secondary school in Lesotho], English is a core subject but at primary school it is not.

Another problem is the limited number of schools, and the capacity of the schools. Schools will often turn learners away, and request them to apply the following year. Yet, when the learners try to apply again, they are informed that they are too old.

The amorphous system of admission, and the limited access to secondary education negatively impacts on the communities. Parents spend many hours trying to get their children enrolled at schools. One parent explained (Ntlhokoe, 2013, p. 63):

We went there for several weeks going daily. I had to stop going to work so that I had to go to that school waiting for the response.

Teachers on the other hand find themselves being blamed and even victimised in the community, because many children cannot be admitted to a particular secondary school due to limited capacity (Ntlhokoe, 2013). Some parents, moreover, believe that schools accept bribes from parents in order to gain access for their children to some schools.

Contrary to what is happening in most developing countries, the relative number of boy children who are admitted to secondary school, is notably fewer than their female peers. Two significant reasons for this exist. Firstly, many boys are expected to herd cattle on behalf of the families, and thus they are not able to attend school (Jacobs & Tlali, 2015). Secondly, boys are perceived to be unruly, and thus schools do not want to admit them. In particular, many boys go to traditional initiation schools, after which they are regarded by the community as “men” and not “boys”.

Schools refuse to accept these boys into secondary schools, because they are perceived to misbehave. One parent exclaimed (Ntlhokoe, 2013, p. 62):

Even if [a boy] has passed Standard 7 well, if they can go to initiation school, they do not admit them.

A challenge for girls, on the other hand, is that if they fall pregnant, they are not allowed back into the secondary school system, and thus they drop out.

Another aspect that negatively impacts on progression to secondary education is the challenge in Lesotho of orphans and child-headed households, inter alia, due to the high prevalence of HIV and AIDS (Jacobs & Tlali, 2015). One principal explained “Many children are orphans at the moment. In several instances you will find that there’s no one to pay fees even if they have passed” (Ntlhokoe, 2013, p. 64). Although such orphans are supposed to get social grants for school fees, it seems as if many orphans do not further their school career, partly because of fees.

Taking into account all of the above, as well as the fact that secondary schools have space only for less than 14 percent of the learners who enter Standard 1, the situation in Lesotho is critical.

Conclusion

While claims are made in terms of widening access to education in many countries of the world, there is a need to explore the nature and meaningfulness of education provision and the restraining factors. It seems that a particular need exists to focus on access, progression and success in secondary education. Still, groundbreaking work towards relevant and meaningful education provision at all levels needs to be acknowledged. Clearly, many challenges exist, and these can only be addressed by researchers who will provide authentic information about the situation and from which policy makers can draw. Voices on innovative teacher training, significant teaching practices and reforms in school and higher education spheres need to be heard. Transformational leadership and appropriate education policies are necessary in order to respond to the challenges. More research towards relevant and meaningful education provision is essential, and needs to remain part of the international Comparative Education discourse. For many decades, Comparative Education, and conferences, such as the *Annual International Conference of the Bulgarian Comparative Education Society*, have been providing a platform for such studies, and will continue to do so in the years to come.

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Part 1

Comparative Education & History of Education

Charl Wolhuter

Jullien: Founding Father of Comparative and International Education Still Pointing the Way

Abstract

The aim of this paper is to conduct such an appraisal of Jullien's ideas and vision, as a guiding light for the future development of the field in the twenty-first century world. The paper commences with a brief biographical sketch of the life of Jullien, followed by his vision for the field. This vision is then placed within the context of the pre-history and history of the field up to today. After Jullien the field of Comparative Education was at first side-tracked by the rise of nation-states, and the field tended to serve rather narrow national interests. However, a series of wide-changing societal changes are taking place in the twenty-first century globalised world. A global education expansion and reform project is taking-off as a response to these changes. The field of Comparative Education is superseded by Comparative and International Education, and with the vision of Jullien, this field has the promise to inform that international project in pursuing its objective of creating a more humane world.

Keywords: Comparative Education, Comparative and International Education, globalisation, Jullien, twenty-first century

Introduction

It is this year 200 years ago that Marc-Antoine Jullien published his book, in which he coined the term "Comparative Education". This publication or "Plan" as it is affectionately colloquially called by Comparative Education scholars, charted a way for the development of the scholarly field of Comparative Education. Jullien is widely hailed as the "father of Comparative Education". After two centuries of vigorous growth, the field stands today before a rapidly changing world, facing new challenges. As the time is apt to re-question the direction and purpose of the field, a re-assessment of the value and relevance of Jullien's vision for Comparative Education appears to be a potentially meaningful exercise. The aim of this paper is to conduct such an appraisal of Jullien's ideas and vision, as a guiding light for the future development of the field in the twenty-first century world. The paper commences with a brief biographical sketch of the life of Jullien, followed by his vision for the field. This vision is then placed within the context of the pre-history and history of the field up to today. The purpose of the field, as contended by comparativists is then surveyed, as are the main trends in contemporary world. In this world, the value of Jullien's vision for the future evolution of the field of Comparative Education is spelled out.

Marc-Antoine Jullien (1775-1848): Biographical sketch

Jullien hailed from a middle-bourgeoise family, active in the politics of the day. Two shaping influences on his life and views were his education and the political events of his age, in which he participated actively. He entered the Collège Navarre in 1785. Here his thoughts were shaped by learning about a diverse number of intellectual streams: the philosophers of the Enlightenment who assured him of the perfectibility of the humanity, of the interior voice of conscience and of the exigencies of reason; and the Encyclopedists convinced him of the continual progress and virtues of the sciences (Gautherin, 2000). He lived through the French Revolution, the Napoleonic Wars, the restoration of 1815 and the 1830 revolution. In these he took active part. He served in the Diplomatic Corps (was being sent to London by the Marquis de Condorcet) as from 1792, then joined the military and, then formed part of the government of Robespierre. He broke with Robespierre and after a spell of journalism went to Italy to become a scribe in the Army of Italy. Subsequently he was part of Napoleon's invasion of Egypt (1798) but later he opposed Napoleon, for which he was imprisoned. He lived through the restoration of the monarchy (1815), and spent his last years publishing political and scholarly journals.

While in the employ of Napoleon he was sent to Italy in 1810, and passed through Yverdon in Switzerland, where he became acquainted with the education reformer Johann Heinrich Pestalozzi (1746-1827). Jullien sent his first three sons to the well-known experimental school of Pestalozzi in Yverdon. Pestalozzi is widely regarded as the starting point of modern pedagogy, in that he substituted experimentation for tradition in classroom practice (Duggan, 1916). Pestalozzi also contended, along many of his preceding and contemporary reformers, that the purpose of education was to bring about a reformed society. But unlike most these reformers, he maintained that this could only be accomplished when every individual has been properly educated. Thus he pleaded for universal education, but with a motive different from the religious reformers.

As could be expected from his occupation as journalist, Jullien was a prolific writer, and a long list of publications, on the politics of his day, and on education, came from his pen. Among the education writings, Fraser (1964, pp. 8-9) regards the following two, both published in 1810, as significant: *Essai général d'éducation physique, morale et intellectuelle, suivi d'un plan d'éducation pratique pour l'enfance, l'adolescence et la jeunesse, ou Recherches sur les principes et les bases de l'éducation* (General Essay of Physical, Moral, and Intellectual Education: Following a Practical Plan of Education for Infants, Adolescents, and Youth, or Researches on the Principles and Bases of Education) and *Essai sur l'emploi du temps, ou Méthode qui a pour objet de bien régler l'emploi du temps* (Essay on the Employment of Time).

Jullien's vision for Comparative Education

What he is best remembered for, however, at least in the field of Comparative and International Education, is his *Esquisse et vues préliminaires d'un ouvrage sur l'éducation comparée* (Plan and preliminary views for a work on Comparative Education), published in three articles during 1816-1817, and as a fifty six page

pamphlet in 1817. Jullien's book consisted in two parts. The first part proposed and motivated the establishment of an international commission on education to collect data on the education of many countries, by means of a questionnaire. Such a commission would analyze and classify this data, and on the basis thereof make recommendations as to how to improve education, and establish a multilingual journal to disseminate educational research. The second part of Jullien's book presents an extensive sample of such a questionnaire. Jullien believed that governments all over Europe in his day were concerned with the reform and improvement of education, but were ignorant in matters of education. It was a matter of indicating the means of satisfying this need in the surest, most efficient and prompt manner. Jullien proposed his plan as a means towards this end. Further, being an expert of the ideas of the French Enlightenment, Jullien believed ignorance led to the conflict and turmoil of his age (French Revolution, Napoleonic Wars) and he saw a solution in education.

Comparative Education: Historical evolution of the field and the place of Jullien

In the historical evolution of Comparative Education seven phases should not be seen as seven sequential and mutually exclusive phases; one following the previous. They should rather be seen as a progressive broadening and expansion of Comparative Education; i.e. of the aims of Comparative Education, of the relevance of Comparative Education, the content of Comparative Education, the themes under study, and of the methods of Comparative Education:

Phase 1: A phase of travellers' tales; since times immemorial

As these travellers' tales of the education practices of foreign societies and cultures are mostly incidental, cursoric and not at all scientifically done, this phase could be regarded as a prescientific phase of Comparative Education.

Phase 2: A phase of the systematic study of foreign education systems for borrowing; since approximately 1830

By the beginning of the nineteenth century, mostly government officials began to undertake comprehensive studies education systems and educational developments in foreign countries, with the goal to borrow best ideas, methods, insights and practices; i.e. to import them to improve their own education systems back home. These developments could be understood against the backdrop of the rise of national states in the countries of Western Europe and Northern America at this time, and the establishment of national education systems of primary education in the states, as part of the national project of state and nation formation. Though comprehensive, these studies of foreign education systems generally do not comply to the rigours of scientific scholarship. Often, on the basis of pre-conceived ideas, beliefs and prejudices, rather than on the basis of evidence, some systems and practices were declared better than others. Comparative Education was still in a pre-scientific stage.

Phase 3: A phase of international cooperation, since 1925

It was at this time when Jullien appeared on the stage, pleading for a scholarly endeavour of "Comparative Education" (he coined the term) serving the interest of humanity rather than narrow national ends. While he had no influence in the world

of his day, in the twentieth century got underway his ideals were realised in a variety of ways. These include International Organisations (such as UNESCO), International Institutes of Education Research (such as Institute of Education, University of London, or the Ontario Institute of Studies in Education, OISE, University of Toronto), professional Comparative Education societies, conferences and journals, and studies international in scope (such as those of the International Association of Education Achievement, IEA).

Phase 4: A “factors and forces” phase, since about 1930

This was a phase when (national) education systems were studied as the outcome of (national) contextual forces, a phase which reached its zenith in the inter-war decades, a phase and paradigm chiming-in with the rise of nationalism and of nation-states in parts of Europe.

Phase 5: A social science phase, since approximately 1960

In this phase, which gathered momentum in post-war Europe and North-America, attempts were made to turn Comparative Education in a full-blown social science. In these decades there was a wide-spread belief in the power of education as total panacea for all societal ills.

Phase 6: A phase of heterodoxy, since about 1970

This was the phase of paradigm wars, the main fault lines between the equilibrium paradigms (such as human capital theory, structural functionalism and modernisation theory) and the conflict paradigms.

Phase 7: A phase of heterogeneity, since approximately 1990

This was a phase of a proliferation of the number and variety of paradigms making up the field.

To summarise, while Jullien formulated a lofty vision for the field, and laid the basis for a science of Comparative Education (the two phases prior to his time were pre-scientific phases) his ideas and vision only came into fruition in the twentieth century. On top of that Comparative Education first went into a phase of remission (“factors and forces” stage) and went into a meandering course (fixation with paradigms) which distracted attention from the mission identified by Jullien.

The aims and purposes of Comparative Education; and the vision of Jullien

Scholars and practitioners of Comparative Education list the aims and purposes of the field under the following rubrics (*cf.* Wolhuter, 2014, pp. 32-35):

- Description: The most basic utility of Comparative Education is to describe education systems/learning communities, within their societal contexts in order to satisfy the yearning for knowledge which is *sui-generis* part of human nature.
- Understanding/interpretation/explanation: On the next plane Comparative Education also satisfies the need to understand: education systems in learning communities are explained or understood from surrounding contextual forces which shape them.
- Evaluation: Thirdly, Comparative Education serves to evaluate education systems the own education system as well as universal evaluation of education systems.

- Application:
 - educational planning: Comparative Education is also used to design a new education system, to plan education, and to reform education systems;
 - teaching practice: Recently there have appeared a number of publications proclaiming the value (or potential value) of Comparative Education in assisting the teacher to improve his/her teaching practice (e.g. *cf.* Planel, 2008);
 - in other fields of Educational study: Comparative Education is also of use to other fields of Educational scholarship (and even beyond, to related fields of social sciences), e.g. for Philosophy of Education, Comparative Education offers a show-case of the track record of the implementation of various philosophies of education in particular places at particular times in history;
 - furthering the philanthropic ideal: Serving and improving the state of humanity: the original inspiration source of the scholarly field of Comparative Education, the philanthropic ideal of the time of Jullien, remains the most noble cause of Comparative Education.

So while Comparative Education is called upon to perform a wide range of functions, these reach their zenith in the philanthropic ideal, a vision of the field first formulated by Jullien.

The current world and the metamorphosis of Comparative Education to Comparative and International Education

Conspicuous societal trends of the current era are the environmental crisis, the scientific and technological revolution (of which an important part is the information and communications technology or ICT revolution), economic growth and increasing affluence on the one hand, on the other persistent economic inequalities, the rise of knowledge economies, the neo-liberal economic revolution, democratisation, the rise of the Creed of Human Rights, the demise of the once omnipotent nation-state and the movement of the locus of control into two opposite directions: upwards towards supra-national and international structures and downwards towards sub-national and local structures and eventually to the level of the individual, the decline in importance of primary (family) and secondary (workplace) social groupings and the rise in importance of tertiary (functional) social groupings, the rise of multicultural societies, the empowerment of minority groups, and the religious-spiritual and values revolutions (*cf.* Steyn & Wolhuter, 2008).

A combination of the above factors firstly underscored the value of education in contemporary society, and secondly resulted in a massive global education expansion project, which got off the ground since the middle of the twentieth century and which is continuing today unabatedly. Globally, higher education enrolments for example increased from 6 317 million in 1950 to 28 084 million in 1970 to 88 613 in 1990 to 180 207 in 2010. Globally secondary education enrolment ratios rose from 13 percent in 1950 to 36 percent in 1970 to 52 percent in 1990 to 70 percent in 2010.

With a global education expansion project rolling forward and with education being looked up to play an important part in the evolving global society of the twentieth century (such as ensuring global peace, or eradicating global economic inequalities), there is a growing contention that Comparative Education should be superseded by Comparative and International Education. International Education is

used as explained by Phillips & Schweisfurth (2014, p. 60), namely that International Education refers to scholarship studying education through a lens bringing an international perspective. With the scholarly field of Comparative Education then evolving into Comparative and International Education, the idea is that single/limited area studies and comparisons then eventually feed the all-encompassing, global study of the international education project.

Conclusion

While Jullien coined the term “Comparative Education”, and while he laid the basis for a science of Comparative Education, his lofty vision for the field was side-tracked and for long the field was practised in a paradigm — though not entirely devoid of merits — standing in the service of narrowly national interests more than serving humanity. In a twenty-first century globalised world of economic changes, rising affluence, the rise of knowledge economies, democratisation and individualisation, the rise of the Creed of Human Rights, wide-ranging social changes and ecological challenges, a global education expansion project is taking form, as a response to these challenges. It is in this context that the field of Comparative and International Education, shooting like a supernova out of Comparative Education, is currently appearing, and with the vision of Jullien, can be a field of scholarship informing an international education project which will rise to the occasion, to create a more humane world.

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Teodora Genova & Nikolay Popov

Presentation of Marc-Antoine Jullien's Work in Bulgarian Comparative Education Textbooks

Abstract

This paper is dedicated to Marc-Antoine Jullien's bicentennial work, which first appeared as a series of three articles under the main title 'Éducation comparée' with a subtitle 'Esquisse et vues préliminaires d'un ouvrage sur l'éducation comparée' published in *Journal d'éducation* from October 1816 to March 1817 and also published as a booklet entitled *Esquisse et vues préliminaires d'un ouvrage sur l'éducation comparée* in Paris in 1817.

These publications lay the foundations of systematic comparative studies of education which give ground Marc-Antoine Jullien de Paris (1775-1848) to be undisputedly regarded as founding "Father of Comparative Education". Jullien de Paris is recognized as the first to use the term comparative education (Crossley & Watson, 2009), set out a method for comparison (Epstein, 1994) and one of the very earliest exponents of systematic international inquiry in education (Phillips & Schweisfurth, 2014). It was thanks to Jullien that the science of education became comparative (Gautherin, 1993).

In this respect, the aim of this short paper is to explore how Jullien's work and contribution is presented in Bulgarian comparative education textbooks published between 1969 and 2014. Five systematic Bulgarian comparative education textbooks have been included in the present study and the findings show that Jullien's work and contribution appear on the pages of all of them, receive respectful attention and prove not to be long forgotten.

Keywords: Bulgaria, Comparative Education textbooks, Marc-Antoine Jullien

Introduction

At the end of 19th and the beginning of 20th Century different lecture courses on foreign education appeared at Sofia University. The courses on 'German Education' and 'English Education' which Peter Noykov, the first Bulgarian professor in education, began to deliver during the first two decades of the 20th Century could be given as an example. Although these courses cannot be regarded as comparative education lecture courses, they laid the foundations of the future development of this university discipline in Bulgaria.

In 1925 Christo Negentzov was the first Bulgarian scholar who introduced Comparative Education as a university discipline in Bulgaria with his lecture course on 'General Theory of School Organization'. In this lecture course he examined and compared the historical development and current state of education systems in about 20 countries. In the 1930s a collection of these lectures was published. However, information on Jullien's deed was missing there for two reasons: a) this was a course on education systems which did not comprise the history and theory of Comparative Education; b) at that time Bulgarian comparativists were not familiar with Jullien's work. The *Esquisse* (1816-1817) remained almost unknown to his contemporaries, but the interest in it arose later due to the fact that in 1885 Franz Kemeny from Hungary, while being a student in Paris, had found one copy of it and later on, in 1935, gave it to the already established International Bureau of Education.

Since 1920-1930s about ten books have been used as comparative education textbooks at Bulgarian universities. Those books can be divided into two types:

- a) textbooks focused on education systems (we can call them comparative education systems textbooks); and
- b) textbooks comprising the history, theory, methodology and practice of Comparative Education (we can call them systematic comparative education textbooks).

This paper examines the second type of university textbooks, namely the systematic ones. The main role of all the textbooks has been “to serve students in university Education programs” (Popov, 2013, p. 34).

The following systematic Bulgarian comparative education textbooks, all written in Bulgarian, have been analyzed in order to find how Marc-Antoine Jullien's work is presented on their pages:

1. Nayden Chakarov (1969): *Problems of Comparative Pedagogy*;
2. Nayden Chakarov & Georgi Bishkov (1986): *Comparative Pedagogy*;
3. Georgi Bishkov & Nikolay Popov (1994): *Comparative Education*. 1st Ed.;
4. Georgi Bishkov & Nikolay Popov (1999): *Comparative Education*. 2nd Ed.;
5. Nikolay Popov (2014): *Comparative Education: A Textbook*.

Presentation of Marc-Antoine Jullien's work

Nayden Chakarov's *Problems of Comparative Pedagogy* (1969) is “the first Bulgarian book in the field” where the author “tried to discuss in detail the basic problems of Comparative Pedagogy from a dialectical-materialistic point of view” (Popov, 2013, p. 34). The term which is used at that time is “pedagogy” to denote “education” in line with the Soviet influence.

The analysis of the textbook contents shows that the name and work of Jullien is presented in the chapter “Antecedents of Comparative Pedagogy”, which belongs to Part 1 of the book, entitled “History of Comparative Pedagogy”. Chakarov (1969) specifies two aspects of Jullien's pioneering deed in Comparative Pedagogy – the use of comparative method in the field and the idea of establishing an international institute. Chakarov claims that in most comparative pedagogy writings Marc-Antoine Jullien de Paris is pointed out as the “father” of theoretically grounded comparative pedagogical studies. According to him, Jullien notably stands out above his predecessors Friedrich August Hecht from Germany and César August Basset from France with his theoretical development of making comparisons in the field of pedagogy as well as his bold practical suggestions for organizing this process (p. 48). In this regard, Chakarov mentions that Jullien is also considered to be the “ideological father” of the International Bureau of Education in Geneva.

After informing the reader of Marc-Antoine Jullien's main life events, leading ideas, prevailing influences and prominent works, Chakarov (1969) refers to his *Esquisse* (p. 49). He states that Jullien examines the issues of trends, objectives and methods of comparative pedagogical studies in addition to the existing hindrances to perform them. Moreover, what he considers as important, is the necessity of exchange of experience between different countries about novelties in the realm of national education and his idea of establishing an international education committee with the task of developing the comparative method, conducting comparative education studies and publishing the results from them in many different languages.

The second Bulgarian comparative education textbook written by Nayden Chakarov and Georgi Bishkov *Comparative Pedagogy* (1986) is also influenced by the Soviet dependence. In this book the authors choose to present Jullien's life and work in the range of three pages and a half (pp. 11-14). Initially and very similarly to the previous book, Chakarov and Bishkov (1986) give a brief biographical reference. After that, they continue describing his major work. The authors emphasize on Jullien's critical attitude towards education at 19th Century French schools. The material about Jullien's work in this comparative education textbook is presented in a brief and descriptive way without aiming at a more detailed examination or analysis made by the authors.

The third textbook, used for the purposes of the present study, is entitled *Comparative Education* (1994) and is written by Georgi Bishkov and Nikolay Popov. "This book is the first one in Bulgaria, which systematically, impartially and without any prejudices examines the historical, methodological and practical aspects of the science" (Popov, 2013, p. 35).

At the very beginning of the book, in Chapter 1 (p. 7), which deals with the periodization of the history of Comparative Education, the authors mention the name of Jullien de Paris in relation to Pedro Rossello's two studies, published in 1943.

In Chapter 2, which examines the history of Comparative Education worldwide, Bishkov and Popov place a special emphasis on Marc-Antoine Jullien's significant representation and his *Esquisse* (pp. 14-15). The authors explain that Jullien's work published as a booklet in 1817 consists of two parts. The first one includes an overview of the comparative method in education, the idea for establishing a comparative education institute and the reasons why it should be established in Switzerland, and definitions of some pedagogical concepts. Bishkov and Popov clarify that in the second part, the research methods are presented. There Jullien mainly uses the inquiry as a research method containing a series of questions aimed at collecting data on education in different countries. Further on, the authors point out that Jullien suggests the collected data to be classified into six series: elementary education, secondary education, higher and scientific education, teacher education, education for women, and legislative aspects of education and its relations with social institutions (p. 15).

Finally, Bishkov and Popov trace back the research and rediscovery of Jullien's work by P. Rossello, H. Goetz, N. Hans, Fr. Hilker, W. Brickman, G. Bereday, etc. They conclude by saying that in Marc-Antoine Jullien's work there could be found the first attempts to establish the methodology of comparative education studies.

The second edition of *Comparative Education* (1999) comes five years after the first one. As a whole, the presentation of Jullien's work remains within the same structure of the textbook. In some places the authors give additional biographical facts about Jullien's life and reveal his pro-internationalist and convinced pro-European standpoints (p. 28). The reader is also additionally informed on Jullien's attempt to construct a "science of education" which should establish the laws that govern the observed characteristics of education along the lines of the natural sciences and following their model.

The last Bulgarian comparative education textbook *Comparative Education* (2014) written by Nikolay Popov places the greatest emphasis and presents to the

largest extent Marc-Antoine Jullien's work and its importance for the development of the field of Comparative Education.

From the very beginning, the Preface directly and firmly reminds the students of the field's bicentenary and introduces the significance of Jullien's pioneering role in using the term comparative education to denote the scientific activity of systematic examination of foreign education. Unlike the rest of the Bulgarian comparative education textbooks stated above, which present Jullien's work in relation to the history of Comparative Education, this publication mainly focuses on the issue of the methodology of Comparative Education and links its beginnings with Jullien's work. Popov chooses to start Part 2 "Methodology of Comparative Education" with an introduction to this part entitled "Jullien and the Beginning of Comparative Education Methodology" (pp. 105-108). The author presents Jullien's ambition in relation to his interest in the philosophy of science and the comparative method. Jullien proposed 'to advance the science of education' by using the method successfully employed in comparative anatomy to compare schools.

Moreover, Popov shows Jullien's comparative tool referring to Gautherin (1995): "Like the natural sciences and following their model, the science of education should establish the laws that govern the observed characteristics of education. With the comparative approach, Jullien thought that he had at last found his own method, not deductive principles of reasoning or formal rules but an instrument for the analysis of observed facts and a procedure for investigation; but he still needed a tool to draw up a 'comparative table of the main educational establishments existing in Europe', of the organization of education and teaching of the 'objects embraced by the course of studies as a whole', and of 'the methods used to form and instruct young people, the gradual improvements that have been attempted and the degree of success achieved'" (Gautherin, 1995, p. 775, cited in Popov, 2014, p. 106).

Finally in this introduction, Popov (p. 107) pays attention to the controversial issue of the exact year when Comparative Education came into existence. According to him, 1816 should be considered as the first year of existence of Comparative Education, because this is the time when the first article of a series appeared and not 1817 as W. W. Brickman (1960, p. 6) inaccurately suggests.

Conclusion

It may be concluded that the presentation of Marc-Antoine Jullien's work in systematic Bulgarian comparative education textbooks is predominantly given in relation to his life and comparative education methodology in a rather descriptive way. Marc-Antoine Jullien's work is presented more as a part of the history and less as a part of the methodology of Comparative Education. The only exception from that observation makes the last textbook *Comparative Education* (2014) where the presence of Marc-Antoine Jullien's work serves the author's purposes of giving thorough explanation of the methodology of the field of Comparative Education.

In the past two decades, in Education programs at Bulgarian universities, textbooks focused on description, analysis and comparison of education systems (called at the beginning of this paper comparative education systems textbooks) have been more often used than textbooks comprising the history, theory, methodology and practice of Comparative Education (called systematic comparative education textbooks and to which the present analysis has been directed). The main

reason for this is the fact that students in various Education programs are more interested in studying education systems than in learning difficult historical, theoretical and methodological problems of the science of Comparative Education. This poses a great challenge to comparativists in Bulgaria: continuously striving to keep systematic lecture courses where Marc-Antoine Jullien's work could respectfully occupy its eternal place.

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“Teach Your Children Well”: Arguing in Favor of Pedagogically Justifiable Hospitality Education

Abstract

This paper is a sequel to the paper which I delivered at last year’s BCES conference in Sofia. Making use of hermeneutic phenomenology and constructive interpretivism as methodological apparatus, I challenge the pedagogic justifiability of the fashionable notion of religious tolerance. I suggest that we need, instead, to reflect *de novo* on theo-(in)tolerance in our present-day pluralistic global society, as well as on its assumed pedagogic relevance. I then proceed to argue in favor of pedagogically justifiable hospitality education.

Keywords: religious tolerance, intolerance, tolerance education, respect, recognition, hospitality

“And you, of the tender years can’t know the fears that your elders grew by. And so, please help them with your youth, they seek the truth before they can die.”
(from the chorus of the 1970-song by Graham Nash: ***Teach your children well***)

Introduction

Six years ago, Afdal argued:

“No serious person or theory operates with absolute tolerance. Even the most tolerant person would admit that there are limits to tolerance and acceptance. This means that both tolerance and intolerance may be legitimate and illegitimate, according to the theory and the understanding of the situation in question” (2010, p. 599).

I still agree with him. In fact, I contend that something is critically amiss with the notion of religious tolerance (hereafter theo-tolerance); especially when considered from a pedagogical point of view. Most people the world over are more or less agreed that the majority of organized religions (if not all) speak openly of love and tolerance. They are eager to inform anyone who would care to listen that no religion in its essence and manifestation advocates intolerance. They are, furthermore, more or less united in their confidence that respect for people, reverence for human life, and communal harmony reflect the essential doctrine of every religion (cf. Sagayam, 1998, *passim*).

Conceptual incarceration

Why then, are acts of theo-intolerance on the increase worldwide, instead of decreasing? Why would some people deliberately and willfully choose to behave in a theo-intolerant manner? Why don’t theo-tolerance-related interventions seem to be making any difference whatsoever as part of our global efforts to curb and, eventually, prevent incidences of theo-intolerant behavior? Is it perhaps because our pedagogical efforts are (at least partially) to blame for this?

I believe that the essential proscription of the mandala of social and moral virtues that are reflected in the religious command “Love thy enemies” (that usually gets operationalized in human endeavors of mutual respect, recognition and hospitality) in favor of the semantically kidnapped, modern *zeitgeist* notion of “tolerance” (especially “religious tolerance”) effectively constitutes conceptual and moral incarceration. I furthermore believe that this is pedagogically unjustifiable. I therefore argue that when the principal yearning and inclination¹ of *homo educationis* (educated man) is conceptually incarcerated, it realistically reduces all subsequent pedagogical attempts to the pursuit of inward-looking, self-righteous, sanctimonious, pretentious, hypocritical and self-justified exhibits of social conduct that are mediated (more often than not) by markedly ill-informed teachers, instructors, coaches, educators and even educationists. In fact, whenever the switch is made in (what are supposed to be safe and dialogical) educational spaces from educated human beings’ primal yearning to look away from themselves towards the Other for assistance, love and companionship-in-relationship, to ventriloquizing the *zeitgeist*-herd’s insistence on using and referring to terms like “religious tolerance”, there is always an educational and moral blackout. For the vast majority of people, this blackout is total and final, for it more or less defines the basis of and rationale for most of their subsequent social conduct.

A pedagogical challenge

It is no wonder then, that more and more scholars are doubtful that theo-tolerance is no longer what it has been cracked up to be (Derrida, 2003; Keet, 2010; Schwab, 2011). Especially since the fourth quarter of 2015, tolerance and education for (religious) tolerance have, consequently, become prime issues on the public agenda in most countries across the globe. More than ever, education is widely regarded as one of the principal redeemers that society (still) has at its disposal to help combat theo-intolerant behavior. So, what should we be doing, then? I wish to contribute to this debate by arguing that us educationists across the globe are pedagogically obliged to reconceptualise the notion of “tolerance” urgently and fundamentally, as well as the way in which most parents, legal care-givers, teachers and teacher trainers currently prefer to engage with and treat the term “tolerance” in pedagogical contexts.

The scholarly literature tells us that theo-intolerance essentially represents a form of religious fundamentalism that is, for the most part, based on a particular conceptualisation of God² and that it can (and usually does, eventually) result in a series of conscious decisions to embark on terror-campaigns against people whom the religious fundamentalists regard as, for example, non-believers. These groups of religious fundamentalist believers — who claim that they are the only true believers

¹ ...namely to think and act away from his or her own ego and to live not for his/her own sake, but for the sake of his/her fellow-man.

² If religion is only a means to reach God and not an end in itself and if religion is not equal to God, then why do religious fundamentalists keep on confusing and, eventually, treating these phenomena as synonymous? If religions are supposed to unite people (according to the Latinate “religare” from which the English term has been derived), then why does religious intolerance end up creating so much social division and hatred?

— often congregate in collective movements that share the same fundamentalist belief matrix. We have witnessed the horrendous effect of this phenomenon yet again in the very recent past. With the rising and socially unsettling influx of refugees in European countries like Belgium, France, Germany, Hungary and the Netherlands since the second half of 2015, most European societies (for an example) are continuing to suffer from, amongst others, (serious) incidents symptomatic of theo-intolerance. On 18 and 19 November 2015, for an example, a hate-fuelled festival of violence was unleashed on hundreds of Parisians by the Islamic State jihadists. Before Paris, there was Beirut and on a Friday in early November 2015, the terror struck Mali yet again. On 14 January 2016, six bomb explosions, apparently imitating the terror attacks on Paris in November 2015, traumatised Jakarta. Twelve people lost their lives on that day: seven civilians and five attackers who were members of the “crusader alliance” of IS.

It is clear that both the intent and incidence of particular fundamentalist groupings’ collective theo-intolerant behavior is gaining exponentially in terms of its extant threat potential. It increasingly endangers human lives and livelihoods the world over, and it jeopardizes the social fabric of civilization itself (UNESCO, 1995, p. 2; cf. also Van der Walt, Potgieter & Wolhuter, 2010; Van der Walt, 2011; Van der Walt & Potgieter, 2012; Potgieter, 2014; Potgieter & Van der Walt, 2014; Potgieter, Van der Walt & Wolhuter, 2014; Wolhuter, Potgieter & Van der Walt, 2014). Twelve years ago already, Pearse (2004, p. 12) discreetly described this lamentable state of affairs as follows:

“The currency of the term tolerance has become badly debased. Where it used to mean the respecting of real, hard differences, it has come to mean instead a dogmatic abdication of truth-claims and a moralistic adherence to moral relativism. Where premodern tolerance allowed hard differences on religion and morality to rub shoulders and compete freely in the public square, liberal tolerance wishes to lock them all indoors as matters of private judgment; the public square must be given over to indistinctness.”

It would seem that besides the fact that all proponents of theo-intolerance tend to filter the religious command “Love thy enemies” through a mindset of highly selective sympathy, they essentially all peddle a three horsemen-like noxious cocktail of prejudicial behavior, namely ignorance, intolerance and belligerent nationalism (cf. Leon, 2015, *passim*).

It is my contention, therefore, that we urgently need to reflect *de novo* on theo-(in)tolerance in our present-day pluralistic global society, as well as on its assumed pedagogic relevance.

Reflecting on tolerance and intolerance

Theo-tolerant, as well as theo-intolerant behavior both reflect an excluding and exclusive gaze inwardly, instead of an including and inclusive outreach outwardly. Theo-tolerance, according to Derrida (2003, p. 16), effectively means that the Self accepts the Other as a subordinate and not as an equal. Extending theo-tolerance towards someone else remains a “...charity [...] a paternalistic gesture” (ibid.). It seems that the notion of tolerance mostly designates a reluctant acceptance of someone less than myself. As such, it gestates dependency and subordination. It cultivates silence and marginalization (to be shunted aside) and it incubates social

invisibility. Theo-intolerant behavior is at the same time self-shutting and self-disconnecting. It makes it possible for human grief and suffering to be inflicted on the Other. Theo-intolerant behavior is rooted in prejudice, fear, ignorance and the distortion of verifiable facts. It gives rise to skepticism, distrust, contempt, backbiting and defamation. Theo-tolerance, as well as theo-intolerance, are essentially self-directed and self-focused. Both theo-tolerant and theo-intolerant behavior degrade and reduce the Other to an example of everything that I do not wish to be myself. Because theo-tolerant as well as theo-intolerant behavior make the likelihood of and opportunity for an interactive encounter with the Other realistically unattainable, it effectively pronounces the Other as being fundamentally unfamiliar and essentially anonymous.

Theo-tolerance and theo-intolerance furthermore focus (and depend) both on so-called “human differences”, instead of on human sameness(es). Accordingly, theo-tolerance (between the person who is tolerating and the person who is being tolerated) is essentially distance-forming, dissociating, detaching and, eventually, alienating. Social distancing and dissociation also work in a restricting, hampering fashion and, above all, it leads to the creation, propagation and diffusion of incapacitating, disqualifying, restricting and, ultimately, damaging prejudices, including the risk of inflicting harm, sorrow, grief and pain. These are some of the reasons why all forms of theo-(in)tolerant behavior usually lead to misunderstanding and the proliferation of inaccurate/false information.

Suggesting hospitality as an alternative

Hospitality, in contrast, concentrates on human sameness. By comparison, hospitality is essentially distance-crossing, closeness-generating, nearness-promoting and inviting. Hospitality, in contrast to theo-(in)tolerance, therefore creates interaction; it creates a safe “tending space”; a dialogical sanctuary in which both the Self and the Other feel that they are accepted completely and that they are genuinely trusted. This tending space and dialogical sanctuary then provide the potential for their being together (social association) ultimately to intensify to a more intimate, fonder, more confidential and encountering relationship (cf. Du Plooy, Griessel & Oberholzer, 1990, p. 118). As such, hospitable behavior is dependent upon the assumption that the kind of dialogue that is allowed to develop inside this dialogical sanctuary does, indeed, have something worthwhile to reveal about each other. Hospitality (especially in the form of unreservedly open, authentic dialogue) is therefore a fundamental means of being-in-the-world. Consequently, it becomes easy to understand that the precondition for hospitable behavior is fundamentally entrenched in indebted respect (i.e. in the kind of unconditional **RE**-spect that is owed to the Other simply because s/he is a human being deserving of such respect), as well as in the intelligibility and comprehensibility of human traditions and human diversity.

Other essential features of hospitality include the continuous **RE**-cognizing, **RE**-ceiving and obliging, accommodating welcoming of the Other. A hospitable person is someone who is eager to learn from the Other and also to offer (of) the Self to the Other, so that s/he, in turn, might learn. It is, therefore, an active, reiterative, dialogic process that is focused and trained on the establishment and maintenance of an authentic existential encounter with the Other (effectively a fundamental

liebendes-mit-einander-sein) (Binzwanger, 2005, p. 189) with reciprocity as its essential feature. It brings us to encounter the Other face-to-face in his or her irreducible uniqueness as an individual who should never be reduced to mere group membership (Conway, 2014, p. 30). As such, hospitality is a configuration of human behavior that continually confronts and challenges self-illusion, self-delusion and eventual misunderstandings.

Hospitality, together with its constituent compartments, namely *RE*-spect and *RE*-cognition, is also a sobering, humbling process that forces the Self to acknowledging modestly how little we know of and about each other and how much we always have to learn from and in an authentic existential encounter with the other. The following quote from Conway (2014, p. 29) captures this pivotal argument:

"Rather, one may stand confidently committed to the truths of the home tradition into which one has been raised and enculturated, but in recognizing the centrality of beliefs, claims and practices to the shared life of one's own community and tradition, one reasonably must extend such recognition to other communities. One must acknowledge that other persons also come to this encounter from a locally situated shared social world shaped by a complex array of commitments and practices that form an intelligible view of and way of being in the world. Recognizing this, one attends to other persons as dwelling within a cultural form of human life that can be meaningfully articulated and understood."

On the basis of all of the above, it could be argued that tolerance as hospitality is, indeed, a precondition for the successful burgeoning of humanity, as well as for the establishment and maintenance of harmonious social inter- and intra-cultural relations. It gives effect to the notion of humanity as being, essentially, a shared, *common* humanity. Hospitality makes it possible for the Other always to be recognized, viewed and treated as neighbor and "guest" (from the Middle English root *gest* for "stranger"). Literally all other persons are "neighbors" (from the Middle English root *neih* translated as "near"), that is, beings close to us on the basis of our shared, *common* humanity (Conway, 2014, pp. 29-31). Hospitality implies, as well as presumes, purposeful engagement as authentic existential encounter (*liebendes-mit-einander-sein*); social interactive behavior that is driven by the unreserved, unconditional acceptance of responsibility for the Other and by a selfless commitment to being available to and for the Other.

Conclusion

We should teach our children well. We should all teach them from now on that unconditional acceptance of the Other is likely to lead conclusively to peaceful human co-existence through hospitality as (a) *RE*-spect and (b) *RE*-cognition. Flourishing, prospering hospitality, which is undergirded by sincere mutual respect and responsible, honorable and reciprocal respect and recognition, is undoubtedly pedagogically justifiable – anywhere on the face of this planet...

Unless tolerant religious behavior intensifies and thickens into hospitable religious behavior, it will remain of very little meaningful use to anybody anywhere. The reason is that hospitality fundamentally implies, presumes and demands an altogether different configuration of human behavioral acumen than apathetic carelessness, aloofness, nonchalance, indifferent toleration, or so-called "non-

interference on principle”. Hospitable behavior is welcoming, open, generous, cordial and non-judgmental behavior. As such, it always commences with the simple, yet powerful procedure of continuous **RE**-cognition of the fact that the Other is present in our space and the s/he announces his/her presence with the memorandum: “*Here I am. Where are you? I am a human being among fellow human beings. I am your equal. Acknowledge, respect and recognize me. I, too, have a countenance, a voice and a point of view that deserves to be respected, recognized, heard and, above all, understood.*” Let us help our children seek the truth. They need it, before they can die.

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Johannes L van der Walt

Theory for Explaining and Comparing the Dynamics of Education in Transitional Processes

Abstract

Countries all over the world find themselves in the throes of revolution, change, transition or transformation. Because of the complexities of these momentous events, it is no simple matter to describe and evaluate them. This paper suggests that comparative educationists apply a combination of three theories as a lens through which such national transitions could be viewed: transitology, social action theory and critical theory. The strengths and weaknesses of each are discussed.

Keywords: national transformation, education system, method of analysis, transitology, social action theory, critical theory

Problem statement

Virtually every country in the world has undergone some form of upheaval and change in the course of its history, some even more than once. These turbulent conditions go by a variety of names such as revolution, transformation, transition, change and as “transitional transformation” (Prica, 2007: 164). Such transformations can last up to five decades or more before “normality” seems to settle in again (Johannsen, 2000: 3; Cowes, 2002: 422). Since such upheavals affect large numbers of individuals and their relations, even entire communities, education in all its forms (informal, formal and non-formal), also politics, the economy, social structures and agriculture and so on, they are by their very nature complex phenomena and hence their dynamics very difficult to analyse, understand and compare.

Due to this complexity, education systems experts and comparative educationists have need of an “instrument” to help them analyse the historical events and the educational ramifications associated with social and political upheaval. Education always seems to form a thread woven into the fabric of transitional processes; its interwovenness with all the other dynamics of transition make them difficult to isolate for closer scrutiny. To complicate matters, as illustrated by the recent transition in South Africa from apartheid to full democracy, education as such might have been employed by the struggling forces as a strategic instrument to help bring about the desired political change (1976-1994) but then became itself affected by the transformation after it had taken place (1994-).

In addition to this methodological difficulty, there might be a tendency among educationists to approach the transition as if it were composed of a set of objective facts and figures just waiting to be analysed and described. Such an approach might, however, result in analyses, comparisons and discussions of the historical “facts” as if they were incontrovertible. Scholars working with a post-positivistic and post-foundationalist research framework will be aware of the shortcomings of this approach. They will be aware of the importance of preparing a pre-theoretical (philosophical) and theoretical substratum in which to root analyses, descriptions

and comparisons of education systems. Scholarship without due attention to the pre-theory (philosophy) and theory undergirding one's research efforts lacks depth and rigour.

The purpose of this paper is to offer a combination of theories that might assist education systems experts and comparative educationists to gain the required depth of insight and perspective when they describe, analyse, explain and compare the recent transformations in countries such as those in the Balkans, the Baltic and southern Africa.

Three aspects of transformation to be covered

A search was made for theories that would cover three main aspects of the transformation in a particular country and education system.

The first aspect that has to be theoretically explained is the overall dynamics of a transformation, including its history and the political conditions that might have played a role. A theory has to be found that could provide researchers with a theoretical bird's eye view of the upheaval that occurred in a particular country during a particular phase in its history, and of education in that particular timeframe. The theory should be able to provide guidelines and pointers for researchers to make an in-depth study of events and particularly the various forces at play. The theory that presents itself for this purpose was transitology.

The second aspect that has to be theoretically analysed and explained is the roles or the actions of the various role-players, actors or agents in the particular sequence of events under scrutiny. Because transitology already pointed to the need of looking into the roles of actors in the transition, among others whether the researcher analyses events from an insider or an outsider view, a theory has to be found that could latch on to this perspective. Social action theory seems to fit this bill.

The third aspect that has to be theoretically covered is the need to be critical about the events and actions described and explained in terms of the first two theories. In line with a post-positivistic and a post-postfoundationalist orientation, scholarship cannot be confined to analysis, description and explanation. The researcher's value orientation compels him or her to evaluate, assess and criticise the results of the analyses and descriptions. Critical theory seems to fill this requirement.

The three theories in more detail

Perspectives flowing from the theory of transitology

Transitology is the science of change. Its purpose is to analyse the complexities of transition (De Wet & Wolhuter, 2009: 361) or political and economic "shifts" (Prica, 2007: 163). It offers an approach and conceptual analysis that helps the comparative educationist to understand the processes of transition. The aim of transitology is to describe, understand and explain the transformation or transition of a system from one condition to another, for example from apartheid to post-apartheid in South Africa. Its purpose is to study and describe the turning points in history (Cowen, 2000: 339), the social turbulences and the dynamics of their development (Bray & Borevskaya, 2001: 346). According to Cowen (2002: 413), it is most interested in particular moments-in-time in a particular education system, in the in-depth analysis

of a particular event (Sweeting, 2007: 159-160). At the same time, it is also interested in the “wider meta-narratives”, the “grand transitions”, and as a result it tends to overlook or see as problematic the individual, personal stories of all those involved in these processes, although it is conceded that the latter might be a rich source of data (Hamilton, 2010: 38-39). Social action theory, as will be shown, can attend to this aspect of the transition in a more appropriate manner. In general, as Cowen (2000: 339) points out, transitions tend to be “complex mixtures” of political, ideological, economic and sociological factors playing an interwoven role.

The focus of transitology is to discover how and why regime change occurred, who the actors and the institutions involved were (Johannsen, 2000: 3). A careful study has to be made of the factors that enabled or facilitated the transition, including the distribution of power within the political system (Johannsen, 2000: 1-2). Questions such as the following have to be answered: when did the analysis take place (during or after the transition; how long after the transition)?; who did the analysis and who were the actors in the transition?; how did the researcher position him- or herself (insider, outsider, participant, observer, victim, perpetrator of change)?; for whom was the change intended, what were all the contingent and contextual factors?; what were the educational ramifications of the change?; what interpretive matrix was used by the researcher?; when was the factual moment that it can be said that the old finally disappeared, and what was the analyst’s own “old” consciousness and immersion in the “old” (Prica, 2007: 175-177)?

Transitology cannot explain all transformation processes adequately due to the complexities of their respective specifications. Transitions may also not be seen as rationalistic, deterministic and teleological processes that inexorably run towards particular end results. They are complex processes involving a multiplicity of factors that influence the outcome (Otakpor, 1985: 146; Sqapi, 2014: 220, 226; Hamilton, 2010: 39). In view of this, transitology should be seen as a theoretical framework that attempts to describe and analyse social change, longitudinally and historically, within a large area with cultural linkages (Hamilton, 2010: 41).

According to Cowen (2000: 338), education is given a major symbolic and deconstructionist role in the social processes of transition, i.e. the process of leaving a particular past behind and redefining a new future. The study of the historical turning points illustrates the influence of political, economic, and other powers upon education (Cowen, 2000: 339). Cowen (2002: 423) correctly argues that education tends in these processes to be redefined to play a decisive role in the establishment of this new future, as was done in South Africa when the anti-apartheid forces used a form of “people’s education” to pave the way for the new post-apartheid future. The case of post-apartheid South Africa also illustrates the problems associated with the question how much of the previous education system has to be destroyed, changed or adapted in order to transform education to be in line with the new political dispensation (Cowen, 2000: 339).

A transitional approach to (educational) reform can furthermore not be “the narration of transitional processes *ex nihilo*”, implying that “history is only now beginning and that prior to (a particular date) the area was without form and void”, as an “epiphany (sudden revelation) or emergence (out of nothing)”. There is no cutting-off point where the “old” just disappears and the “new” appears. Generally speaking, however, it can be said that transitions represent an ideological break with

a previous system, and they can either be sudden and spectacular or smooth, gradual and unspectacular (Prica, 2007: 174, 163, 164).

An important aspect of transitology is whether the scholar analyses and describes the transition from an outsider (etic, deductive, top-down) or an insider (emic, inductive, bottom-up) perspective. Insiders theoretically possess an in-depth dimension, a “secret” cultural code which may transform a negative social experience into acceptable, normalised levels of local knowledge. They have the advantage of “cultural intimacy”. According to Prica (2007: 165), the insider might be a more “natural” and more authorised representative of the particular cultural experience. On the other hand, the insider might be guilty of presenting optimistic and positive domestic insights. To avoid this, the insider researcher should follow the regime of rigorous research and has to understand that culture is an area in which s/he is both witness and actor. The insider perspective might also be more appropriate for research areas that have not yet been heavily theorised.

Some practitioners of transitology go beyond the original intentions of this approach in that they see it as a normative paradigm that can offer guidelines for transition (Sqapi, 2014: 217). This view is not supported in this paper; transitology is not assumed to be prescriptive about transitional processes (Sqapi, 2014: 218-219; 226). An assessment of the roles of actors and institutions (Przeworski, 1988: 64) is reserved for the third phase of the discussion, namely the critical phase, to be discussed below.

Perspectives flowing from social action theory

Social action theory focuses on the roles of the actors involved in the transformation. It is interested in the interaction among agents and their mutual orientation, and / or the action of groups (Audi, 2005: 853). An important term, therefore, in social action theory is symbolic interactionism, an idea belonging to a kind of interpretive sociology which is interested in not only a subjective sense of social phenomena but also in their causal explanations (Mucha, 2003: 2). Educationists should nevertheless resist the temptation to impose *their* meanings upon the observed facts; only the agents involved could enunciate them (Otakepor, 1985: 140).

Social action, according to Max Weber, is the behaviour of an individual, either historically observable or theoretically possible or likely, in relationship to the actual or anticipated behaviour of other actors. Each social action takes account of that of others and is oriented to them (Hamilton, 2010: 42-43). An action of a human individual is of a social character regardless of whether or not it takes into account the behaviour of another individual or a group of individuals. Both individuals and groups can be the subject (agent, actor) of social action. Institutions such as education systems consist of individuals carrying out social actions designed to achieve the goals of the institution (Trueman, 2015: npn). Action, according to Max Weber, always centres on meaning; action is directed by meaning. Affective or emotional action stems from individuals’ emotional state at the time; traditional action is based on established custom, based on built-in habits, and rational action involves a clear understanding of a goal (Trueman, 2015: npn; Emirbayer, 2005: 186-190).

Social action theory attempts to tread carefully between the determinism of positivism, structuralism and systems theory, and total indeterminism in the form of voluntarism, idealism and other forms of subjectivism (Otakepor, 1985: 146;

Trueman, 2015: npn). In its attempt to follow this narrow route, it makes use of two forms of understanding of social action: observational understanding and explanatory understanding. The researcher tries to understand the meaning of an act in terms of the motives that have given rise to it. To achieve this kind of understanding one must put oneself in the shoes of the person whose behaviour you are explaining, and try to understand their motives (Trueman, 2015: npn).

The researcher has to gain an interpretive grasp of an action in its context. The context of an action might be historical (i.e. the actual intended meaning of the action), a sociological mass phenomenon, or that of a scientifically formulated pure type or ideal type (Mucha, 2003: 3).

Some actions are social in the sense that they can only be done in groups (Hamilton, 2010: 42-43). Social group action is a synthesis of individual actions which tie together two elements of culture: ideological values and social values. To manage their relationships, social actors must understand others' actions and intentions. This is attained, according to Hamilton (2010: 42-43), through the evolved cognitive ability to generate long connected skeins of actions and reactions and to comprehend the complexity through narrative thought.

In monological action, the agent's fulfilling of his or her purposes depends only on the contingent facts of the world; however, social action is also contingent on how other agents react to what the agent does and how that agent reacts to other agents, and so on (Audi, 2005: 853). Social action can take many shapes: co-operation, obstruction, conflict, hostility, unilateral, asymmetrical, and aimed at a mutual orientation or with widely different aims, of different duration (Mucha, 2003: 4-6). The difference in values of the various actors is most obvious when it appears in conflict (Mucha, 2003: 13-20).

As in the case of transitology, social action theory operates with the notion of an "insider" and an "outsider" view. Social relations can be either open or closed to outsiders (Mucha, 2003: 7).

Perspectives flowing from critical theory

Science / research is never completely value-free and objective. Every description, explanation, interpretation and comparison in terms of either of the previous two theories will therefore inadvertently reflect the value system of the researcher. Whereas the first two theories focused on *describing* the dynamics and the actions of the various role players, critical theory is also practical, self-reflexive and above all *normative*. The critical assessment done in terms of critical theory is based on the empirical evidence provided by the first two theories as well as on the best available social theories (Honderich, 2005: 311-312). Critical theory traces the origins of the social processes (transformation) described in terms of the previous two theories, particularly their ideological assumptions and interests (Honderich, 2005: 312). Application of critical theory provides the researcher with understanding of the agents who wished to improve their social conditions through transformation of the status quo, how they wished to emancipate themselves and remove the limits to their freedom and to eradicate them and their society from the causes of human suffering. Critical theory is self-reflexive in that it accounts for its own conditions of possibility and for its possible transformative effects (Audi, 2005: 195).

Concluding remark

Application of a combination of the three theories discussed in this paper can lend theoretical depth and rigour to descriptions of political and educational transformations that would otherwise have been rather theoretically shallow.

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Teodora Genova

Nordic Internationalists' Contribution to the Field of Comparative and International Education

Abstract

This paper stems from a PhD dissertation research focusing on the Nordic representatives' contribution to the field of comparative and international education (CIE) since the middle of the 20th century to the present days. Following the idea of the clear-cut distinction between the two component parts of the field in the region in question, the purpose of this study is to identify and point out the key achievements of six Nordic internationalists in the field of CIE from Sweden, Norway, Finland and Denmark. Firstly, they are regarded as a group which collaborated and rallied around the Nordic Association for the Study of Education in Developing Countries (NASEDEC) for nearly 20 years. In this respect, the crucial role of the national donor agencies, which assist developmental aid to education in financing and promoting international research, is examined. Secondly, the work and research activities of the internationalists under review are analyzed in order to find the individual contributions to the field and their prevailing characteristics. Thus, by making an attempt at searching for the internationalists' scientific achievements, the author finds what the applied development of the field of CIE in the Nordic countries looks like.

Keywords: developing countries, donor agency, education for development, internationalist, Nordic, practice

Introduction

The Nordic countries, i.e. Denmark, Finland, Norway Sweden and Iceland, "have much in common, historically, culturally and linguistically. They have had a common labour market and strong co-operation in many areas for many years" (Fägerlind & Strömqvist, 2004). The field of CIE is not an exception from that. Bearing in mind the fact that Nordic countries have small territories and population, they have comparatively small institutions, units or sections involved in CIE (Daun, 2009). Consequently, Nordic scholars need to co-operate with each other, although Iceland has never or rarely had any representation in the regional forms of co-operation, which is the reason to exclude it from this study. At the same time, Nordic countries are internationally recognized for their "high levels of democracy, education, income and public wealth" (Holmarsdottir & O'Dowd, 2009), obliging them to be committed to development co-operation mirrored in the support of many of the world's poorest countries (ibid.).

From the 1960s onwards when the Nordic parliaments passed their first acts on developmental aid and established their national donor agencies to administer it, there has been observed an upsurge in the international research activities in this region. They have been carried out by professionals from the Nordic countries interested in promoting education for development mainly in the Third World countries and the countries in transition commissioned by the donor agencies. Daun (2009, p. 291) asserts that "people with direct experience from development work in the South are well represented here". The focal point of the Nordic internationalists

is NASEDEC. Six prominent internationalists from the Nordic countries have been selected and their contributions have been identified in relation to their participation in NASEDEC and research involvement with the donor agencies. Furthermore, each of the selected internationalists' contribution is given by briefly outlining a few areas of scientific achievement in the field of CIE in order to find their uniqueness of perspectives and practices.

Nordic Association for the Study of Education in Developing Countries (NASEDEC)

From among the four Nordic organizations which are associated with the field of CIE throughout the region, NASEDEC is the oldest and the one which has had the most members and activity (Brock-Utne & Skinningsrud, 2013). It was established in 1981 at the University of Oslo “to serve, according to its statutes, as a forum for contact and exchange of experience between researchers, students and practitioners from the Nordic countries [...], to promote teaching and research on education in developing countries, and to serve as a point of contact for non-Nordic institutions and individuals” (Takala, 1996, p. 1). The formation of this association comes in response to the intensified interest of the internationally oriented scholars from the four Nordic countries in the educational development aid to developing countries. This interest arises partially from the international Six Subject Survey (1966-1973), which has been conducted by the International Association for the Evaluation of Educational Achievement (IEA), whose chairman at that time was Torsten Husén, a professor at Stockholm University. It is not surprisingly, then, to say that he was the first president of NASEDEC, followed by his successor Ingemar Fägerlind. In addition, NASEDEC represents a clear indication of specialization in educational development taking place by the late 1970s not only in this region, but also worldwide. According to Chabbott (1998, p. 214), “the study of developing countries has occupied considerable space in major CIE journals and conferences leading to the establishment of at least one specialized journal”, called the *International Journal of Educational Development (IJED)* founded in the same year as the Nordic association. NASEDEC becomes a synonym of organizing conferences as the uppermost form of activity, claims Takala (1996). A large number of the Nordic international development professionals publish their field-related articles on IJED pages (Buchert, 1994; Brock-Utne, 1995; Lauglo, 1996; Takala & Piattoeva, 2012; etc.) and/or are members of its editorial board (Jon Lauglo since 1995; Holger Daun since 2004; etc.).

The internationalists form the backbone of NASEDEC and some of them are also members of its governing board. Simultaneously, they are associated with other organizations such as the IIEP of UNESCO, Paris, The Centre for the Study of Education in Developing Countries, Hague, The World Bank, etc., thus facilitating the co-operation with potential invited speakers at NASEDEC conferences organized in rotation every year. In an interview with Brock-Utne (September, 2015) she explains that the development agency in the country where the conference is hosted always comes up with a good grant for researchers from the developing countries to attend the conferences. The region of the world which receives the most research attention on the part of the Nordic internationalists and where the majority of the participants from the developing countries come from is the Sub-Saharan

Africa including Ethiopia, Tanzania, Kenya, Zambia, Botswana, etc. This is also the region which receives the biggest share of Nordic development aid to education through the national aid agencies.

Having analyzed the probable connections of the Nordic internationalists with NASEDEC, their participation in the Association conferences and published reports, the findings show that their contribution could be viewed separately into two areas: 1) managerial and/or organizational activity; 2) NASEDEC conference participation in the form of seminar report/paper presentations and/or editing NASEDEC conference proceedings.

In relation to the first area the following examples can be mentioned:

- a) Ingemar Fägerlind succeeded Torsten Husén to the position of president of NASEDEC.
- b) Birgit Brock-Utne was a member of the governing board of NASEDEC from 1994 to 1999. She was charge of organizing NASEDEC conference held in 1995 at Agricultural University of Norway, Ås, Norway on the topic "The Role of Aid in Implementing Education for All".
- c) Jon Lauglo was a member of the governing board of NASEDEC between 1981 and 1982 and 1985 and 1990. He was a member of the organising committee of the 1995 annual conference of NASEDEC. He was actively involved in planning the conferences of NASEDEC in 1981 and 1982.
- d) Tuomas Takala was the president of NASEDEC between 1994 and 1996 and a member of the governing board between 1991 and 1994.
- e) Lene Buchert was a member of the governing board for 12 years from 1984 to 1996 and co-organized all the conferences held in Denmark.

Four conference proceedings containing seminar reports or papers written by the Nordic internationalists have been analyzed in order to point out only a small part of their merits in the second area. The publications in the conference proceedings come as a result of the Nordic internationalists' participation in NASEDEC conferences given below the proceedings. They are the following:

1. Buchert, L. (Ed.) (1992): *Education and Training in the Third World: the Local Dimension*. Hague: Centre for the Study of Education in Developing Countries.

Participation in 1991 NASEDEC conference in Hornbaek, Denmark.

2. Takala, T. (Ed.) (1994): *Quality of Education in the Context of Culture in Developing Countries*. Department of Education, University of Tampere, Report Series B, nr. 12, 1994.

Participation in 1994 NASEDEC conference in Tampere, Finland.

3. Brock-Utne, B. & Nagel, T. (Eds.) (1996): *The Role of Aid in the Development of Education for All*. University of Oslo. Institute for Educational Research.

Participation in 1995 NASEDEC conference in Ås, Norway.

4. Malberg, L., Hansén, S. & Heino, K. (Eds.) (2000): *Basic Education for All: a Global Concern for Quality*. Åbo Akademi University.

Participation in 2000 NASEDEC conference in Vasa, Finland.

In addition, the book *Education Reform in the South in the 1990s* (1998) edited by Lene Buchert was published in co-operation between NASEDEC and UNESCO.

The following publications by the sixth Nordic internationalists are examples of their research activities included in the NASEDEC conference proceedings.

- a) Ingemar Fägerlind & Holger Daun (1992): *The Context for Educational Policy-Making by the Swedish International Development Authority (SIDA) and Its Educational Cooperation with Tanzania*. In Buchert, L. (Ed.) (1992).
- b) Birgit Brock-Utne (2000): *African Languages in the Area of Globalization*. In Malberg, L., Hansén, S. & Heino, K. (Eds.) (2000).
- c) Jon Lauglo (1992): *Policy Issues in Vocational Training*. In Buchert, L. (Ed.) (1992).
- d) Holger Daun (1994): *Holistic Education, Quality and Technocratic Criteria of Competence – Cases from Guinea-Bissau and Senegal*. In Takala, T. (Ed.) (1994).
- e) Tuomas Takala (1994): *Equity and National Unity vs. Cultural Diversity in the Educational Reform of Independent Namibia – the Long Shadow of Apartheid*. In Takala, T. (Ed.) (1994).
- f) Lene Buchert (1995): *The Concept of Education for All – What Has Happened after Jomtien?* In Brock-Utne, B. & Nagel, T. (Eds.) (1995).

After NASEDEC existence for nearly 20 years “the conservative government which took over in Denmark at the beginning of the new millennium did not want to grant money for NASEDEC, and made cuts in the development aid budget. At that time the NASEDEC secretariat was based in Denmark. The organization never recovered from this blow” (Brock-Utne & Skinningsrud, 2008, p. 116).

Four Nordic national aid agencies

Most of the research-related activities of the Nordic internationalists who are members of NASEDEC are commissioned and financed by the Nordic national aid agencies. They are SIDA or Sida (since 1995) (Sweden), NORAD (Norway), FINNIDA (Finland) and DANIDA (Denmark). O’Dowd, Winther-Jensen & Wikander (2015) claim that “the economic contributions of the Nordic countries in general are above the UN recommended 0.7% of the GNP with Norway and Sweden as the highest contributors” adding the figures of Norway and Sweden: 0.94%, Denmark: 0,81%, and Finland: 0.46% of the GNP. The world-known generosity of the Nordic aid agencies, especially those of Sweden and Norway, has led to the establishment of the firm positions of the Institute of Education, University of Oslo, Norway and the Institute of International Education (IIE), University of Stockholm, Sweden, which are regarded to be “the Nordic centres of developmental education from the 1980s and onwards” (ibid). The four Nordic aid agencies share the mutual goal of reducing the level of poverty in developing countries and in this way they contribute to a better global development.

The connection of the Nordic internationalists with the aid agencies could be found in their employment position within their organization: the ones who have worked with SIDA/Sida and NORAD “have been employed within the education divisions of the agencies” in contrast to the other ones associated with DANIDA and FINNIDA who have occupied the positions of education advisors (Takala, 1996). They combine these activities with playing the roles of either team leaders, consultants and/or evaluators of agencies’ support to the education sector or international projects, maintaining their university positions, which leads to what

Kenneth King (1995, p. 10) term “multiple roles of academics”. SIDA/Sida is the most active aid agency in respect to providing a platform for publishing the research studies of the internationalists through the series “SIDA Education Division Documents” and later since 2002 “Sida: New Education Division Documents”.

There can be mentioned only a few of the numerous studies and evaluations of the Nordic internationalists commissioned by the Nordic national aid agencies:

1. Ingemar Fägerlind (1989): Supporting Zambian Education in Times of Economic Adversity, An Evaluation of Swedish-Zambian Cooperation in Education 1984-1989. Education Division Documents, No. 44.
2. Birgit Brock-Utne (1988): Education Policies for Sub-Saharan Africa: Adjustment, Revitalization and Expansion. The Bureau of Education and Scholarships for Overseas Studies. Oslo: NORAD.
3. Jon Lauglo (1991): Vocational Training in Tanzania and the Role of Swedish Support. Education Division Documents, No. 48. Stockholm: SIDA.
4. Holger Daun (1992): Neo-liberalism, Structuralism and Primary Education in Mozambique. Education Division Documents, No 58. Stockholm: SIDA.
5. Takala, T., Boesen, I., et al. (1994): Mid-term Review of the Finnish Education Sector Support Programme in Zambia. FINNIDA.
6. Lene Buchert’s contribution to the international research activities in relation to the Nordic aid agencies could be justified with the fact that she is the Nordic scholar who provides empirical evidence for the aid policies of two of the Nordic agencies in her article Education and Development: A Study of Donor Agency Policies on Education in Sweden, Holland and Denmark (1994) (interview with Lene Buchert, October, 2015). This was followed up with other publications on aid-related issues such as Recent Trends in Education Aid: Towards a Classification of Policies. Paris: UNESCO/IIEP (1995), etc.

Prominent internationalists in the Nordic countries

The criterion which has been used in this study to select the internationalists and analyze their contributions to the field of CIE is limited to the availability of scientific resources and responsiveness on their behalf. During a two-month study period at the Department of Education, University of Oslo, Norway, four out of six internationalists were interviewed in person or by phone; e-mail correspondence with the other two internationalists was maintained, data on curriculum vitae, professional development, relevant publications, etc. was gathered; their work in terms of practical research and teaching was analyzed to outline their contributions to the field of CIE.

Each of the sixth selected Nordic internationalists’ individual contribution is discussed below by outlining a few areas of scientific achievement in the field of CIE.

1. Ingemar Fägerlind’s major contribution to the field of CIE is the co-authorship of *Education and National Development: a Comparative Perspective* (1983, 1989) together with Lawrence Saha. It marks the turning point in the major activities reorientation of IIE towards the shift from the initially dominating interest in school achievements which was later gradually replaced by an interest in international education planning, especially in developing countries (Dahl &

Danielson, 2014). Moreover, this publication is placed among the most frequently assigned readings by single/first authors in the introductory comparative education course in the CIECAP database (30 universities reporting, 2003-04 and 2005-06) (Wiseman & Matherly, 2009, p. 348).

2. Birgit Brock-Utne is the founder and director of the Master's Programme in CIE at the University of Oslo, Norway from 1998 to 2008 which specializes in "Education and Development". She is also the author of the Programme main textbook *Whose Education for All? The Recolonization of the African Mind* (Brock-Utne, 2000; 2006). This reading is one of the most authoritative critical publications written by Brock-Utne and focuses on the relationships between the aid agencies and their aid recipients, the problems arising from the use of language of instruction and the phenomenon of globalization in the context of education systems in Africa.

3. Jon Lauglo's main contribution to the field of CIE lies in exploring the theme of vocational training and practical subjects particularly at secondary schools in developing countries. He uses the term "vocationalisation" of secondary education, which he defines as "curriculum change in a practical or vocational direction" (Lauglo, 1988, p. 3). According to him, the major purpose of "vocationalisation" is the improvement of vocational relevance to education, which is achieved by introducing vocational or practical subjects as a minor portion of the students' timetable during the secondary school course and the most important reason why governments introduce this type of training.

4. Holger Daun's contribution to the field of CIE could be restricted to dealing with the theme of globalization and educational reconstruction in line with the definition of the phenomenon proposed by Phillips & Schweisfurth (2014, p. 63), who claim it to have "enormous implications for the field of CIE", "education internationally" and which now "has become a subject of research and much discussion in itself". One of the most ambitious project of Daun as an editor in this direction is the publication *Educational Restructuring in the Context of Globalization and National Policy* (2002).

5. Tuomas Takala is in charge of the university course Education in Developing Countries: Problems and Possible Solutions and the research group International Perspectives on Educational Discourses, Policies and Practices, School of Education, University of Tampere, Finland. The course main objective is "to give the participants an understanding of the key educational problems in developing countries and of the efforts of these countries, as well as of development cooperation, in finding solutions to the problems" whereas the research group aims at performing interconnected studies which investigate the discursive formation of educational policies on international and local arenas and the intended and unintended effects of policies on educational practice (Takala, 2015).

6. Lene Buchert has succeeded and been coordinating the Master's Programme in CIE at the University of Oslo, Norway since 2009. In the course curriculum could be found a systematic presence of the theme of Education for All which resulted in The Jomtien Declaration. According to Buchert (1995, p. 538), it "can be seen as the culmination of international educational thinking on education in 1990 based on practices in the 1980s". The study of this particular theme and the issue of the role of numerous national aid agencies in educational development among other

important concepts correspond to her main academic interests and contribution to the field of CIE.

Conclusion

Using the matrix of four different research circumstances by Phillips & Schweisfurth (2014, pp. 67-68), in the end, I think the group of the Nordic internationalists belong to the third quadrant where “the researcher has a depth of understanding of a context which is very different from his or her own”. Consequently, the Nordic internationalists under review gain considerable competences and practical experience with education in one specific region, which is the Sub-Saharan Africa, to such an extent that the context becomes as familiar as the home situation. Thus, their research activities contribute to the practical development of the field of CIE.

In conclusion, the research and teaching activities of the Nordic internationalists substantially contribute to the professionalization of the field of CIE in their region. The grounds for claiming this is asserted by Wiseman & Matherly (2009, p. 335), who define two basic characteristics of the extent to which the field of CIE has reached professionalization: the existence of university programs and professional associations. The formation of NASEDEC and the internationalists’ involvement in it, the university programmes in CIE, their publications in *International Journal of Educational Development*, their research activities commissioned by the Nordic national aid agencies in combination with each internationalist’s unique “lenses” through which they look at development education matters all undoubtedly contribute to the professionalization of the field of CIE in the Nordic region.

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Karen L. Biraimah

International Research Partners: The Challenges of Developing an Equitable Partnership between Universities in the Global North and South

Abstract

This paper, which builds upon research linked to the development of sustainable study abroad programs in emerging nations, focuses on key challenges to true partnerships between emerging and established universities. It begins with an analysis of challenges which may occur when attempting to develop an equitable partnership based on joint grants and/or research projects. It also includes a discussion of struggles experienced by academic staff who desire a more equitable relationship that will enhance the missions of both institutions. The paper will then analyze one particular partnership between two universities (the University of Central Florida, USA, and the University of Botswana) during study abroad programs funded by the Fulbright-Hays Groups Project Abroad (2011) and the U.S. State Department (2012-2015). An analysis of this partnership is particularly relevant as it focuses on the initial steps, dialogues, perspectives and actions of both institutions as they worked through a host of preconceived notions on neocolonialism and the challenges of successfully operating by another's "rules of engagement" within a dynamic geopolitical platform.

Keywords: collaborative research partnerships, study abroad programs, emerging nations

Introduction

As the process of globalization expands, collaborative relationships between institutions of higher learning worldwide cannot be ignored. Moreover, the goals of globalization and international partnerships can be valuable to home and host institutions alike. In most instances, the development of international partnerships are motivated by institutions in the Global North and South to advance their academic interests and goals, and thus seek to develop the strongest, and most advantageous strategic alliances that support both globalization and the commodification of education (Nuffic, 2008).

To this end, equitable and effective collaborative partnerships may be the best means to enhance quality research while improving educational standards across the Global North-South divide. Moreover, equitable and collaborative research programs enhance both the academic outputs and visibility of partners in the Global South, while building the capacity of the Global North to conduct relevant research in emerging nations (Gaillard, 1994). Moreover, as Angeles and Gurstein (2000) observe, while there are daunting pressures and demands on economies in the Global North, these pressures and demands are more extreme in the Global South due to deepening poverty, decay of public institutions, and less than efficient governance. These challenges make Global North-South relations both fragile and complex.

This paper, which focuses on key challenges to true partnerships between universities in the Global North and South, applies these theoretical notions to actual field research on the development of sustainable study abroad programs in emerging

nations for pre-service education students. The paper begins with an analysis of challenges frequently experienced by universities from the Global North and South when attempting to develop an equitable partnership based on joint grants and/or research projects, including the struggles experienced by faculty at both universities who desire a more equitable relationship that will enhance the missions of both institutions. Following this theoretical analysis, the paper focuses on one particular partnership between two universities from the Global North and South (The University of Central Florida, USA, and the University of Botswana) during study abroad programs spanning five years and funded by the U.S. State Department (2012-2015) and the Fulbright-Hays Groups Project Abroad (2011).

Issues linked to equitable partnerships between institutions in the Global North and South

Unfortunately, even when universities from the Global North and South are cognizant of the challenges embedded within partnerships, the path to developing a sustainable, quality programs, grants and the like that have the capacity to positively impact both partner universities is often obstructed by varying expectations and miscommunications. The socio-economic disparity of universities obviously exacerbates these challenges. In order to overcome these challenges, Wohlgemuth and Olsson (2003) advise that dialogue, rather than domination, be promoted among the partners, and that such an approach encourage the development of shared values. Moreover, while “capacity building” is often touted as a key outcome of international partnerships, the “power relationships (based on inequitable wealth) may become a significant barrier to communication and immersion”, and may inhibit positive outcomes normally expected of study abroad programs (Woolf, 2006, p. 142).

A partnership between the University of Central Florida (UCF) and the University of Botswana (UB): A “One-Way” Study Abroad Program?

To further examine these theoretical notions about the development of equitable partnerships between institutions in the Global North and South, this paper now shifts its focus towards one particular partnership between an institution in the Global North, (UCF) and an institution in the Global South, (UB).

Modes of Inquiry/Data Sources

This study is based on a comprehensive and extended review of pertinent literature focused on the development of equitable partnerships between institutions in the developed and emerging worlds, and an analysis of the sustained partnership between UCF and UB, based on shared experiences within a 2011 Fulbright-Hays Group Projects Abroad in Botswana and a three-year U.S. Department of State Grant, *Capacity Building Program for U.S. Undergraduate Study Abroad*, awarded to UCF and UB in August 2012 and continuing through 2015.

Addressing the challenge of over-committed faculty from the Global South

Given the usually high faculty/student ratios in many emerging universities, this can negatively impact the quality of programs and instruction. Moreover, even when study abroad programs occur during vacation periods, host institution faculty often come to the challenging realization that they have insufficient time left to devote to career advancement activities which include research, publications, and grant proposal writing. Fortunately, these challenges can be mediated in two ways. First, whenever possible, study abroad programs should be scheduled during a host university's long vacation periods. Second, these programs should offer meaningful opportunities for both home and host institution faculty to engage in collaborative research and publication activities. For example, the 2011, 2013, 2014 and 2015 projects in Botswana were scheduled during May, June and/or July, months when most UB students were on vacation. Moreover, faculty from both partnership institutions successfully engaged in numerous scholarly activities, resulting in joint conference paper presentations by Biraimah & Jotia at CIES (2012-2014), SACHES (2014), SAERA (2015) and ISCS (2013) and a recently published paper in the *Journal of Studies in International Education* (Biraimah & Jotia, 2013).

Challenges to establishing an equitable and collaborative partnership

Beyond the above logistical impediments, however, remain numerous challenges to establishing a truly collegial, collaborative and reciprocal partnership between institutions in the Global North and South. And while multiple grants and study abroad projects such as those in Botswana provide enticing possibilities for "capacity building" (as defined from a Global Northern perspective), the final impact may vary from original expectations due to a plethora of issues linked to the "human condition".

Challenges to building a consensus document

While grant *Requests for Proposals* (RFPs) may appear to provide clear direction and definition, proposal development and program implementation can produce an alternate reality. Due to heavy teaching and service loads, and a perceived lack of project ownership, faculty from the Global South may not identify initial proposal development as a key responsibility, as do their colleagues from the Global North. For example, the UB faculty team did not engage in systematic critical editing of a grant narrative linked to proposed study abroad programs (2012-2015), though they did provide succinct edits related to a description of their institution. Moreover, voiced disappointments regarding the lack of reciprocity once the proposal was funded suggested that the UB team had envisioned a program which varied significantly from the final proposal, which strictly observed RFP guidelines.

Perspectives on timeliness and detailed planning

While a neutral middle-ground with regard to priorities and timeliness would have facilitated planning, this was perhaps an unattainable goal given the differing perspectives on what constituted prioritized issues and appropriate time lines. And

even though many faculty members from emerging universities have extensive experiences in, and often terminal degrees from institutions in the Global North, their American counterparts should not assume that faculty teams from the Global North and South necessarily share identical values and perspectives.

Unfortunately, this difference in acceptable levels of detailed planning persisted throughout the grant, and continued to cause misunderstandings and angst on both sides of the Atlantic. For example, logistical issues surrounding the development of plans for extended immersion experiences in rural communities continued to demonstrate the divergent perceptions and expectations of faculty from UCF and UB. During initial planning sessions held at UB in October 2012, it was agreed that students and faculty would be divided between two rural schools. However, UB expanded these two sites to three, without consultation with their American colleagues. The UCF team found out about this change through a brief email listing the names of three schools. When UCF's project manager pressed her UB counterparts for the schools' locations, she was informed that a school's name was also the community's name (which turned out to be perfectly true, though UCF's search engines could not locate two of the three communities). Pleas for additional information regarding the size of the communities and their capacity to house participants in homestays and/or public lodging (key data that would drive a final budget), remained unanswered well into the new year. Clearly, until all locations were identified, it would be impossible to develop a final budget – which in turn would dictate the length of the final study abroad program, itineraries, and international airline reservations. Unfortunately, the high level of angst felt by UCF team members may have occurred through misperceptions regarding acceptable patterns of communications.

In retrospect, the UB team perceived their UCF partners as demanding information “at the speed of thunder” (UB's terminology), without taking into account the communication problems that existed with the three remote localities; especially at the primary school sites. Search engine technology, so easily accessible in the Global North, was not as effective in Botswana's marginalized rural communities. Moreover, key logistical information often required UB faculty members to undertake extended travel on rough gravel roads while their UCF counterparts waited impatiently for their phone calls to be returned.

Financial hurdles

US Government grants and perceived status differentiation

Though universities in the Global South may receive a share of the budget, U.S. federal grant requirements usually stipulate that an American institution “will control” the budget, clearly leaving their “partners” in dependent roles. In this case, UB was included in the development of grant narratives and budgets, but UCF remained the “lead institution”. Moreover, as substantial amounts of funding came directly from participant fees, financial control fell even more solidly into UCF's hands. While UB was allocated funds through a mutually agreed upon sub-contract (covering local expenses such as dormitories, guides, and faculty honorariums), the reimbursable nature of this grant precluded UB from managing substantial portions of the grant's budget (and from the benefits of lucrative overhead revenues). For

example, the grant from the U.S. State Department was initially designed for most expenditures, except international airfares, to occur within Botswana. Yet UB's sub-contract accounted for only 11% of total federal funds, as a lack of sufficient cash reserves kept them from a greater share of the grant's 26% overhead rate, a significant revenue which will now go to UCF. The old adage, "it takes money to make money" appears to apply in this instance.

Dueling accountants

Even when grant funds have been allocated in an equitable manner, other factors may keep "partner" universities on unequal terms, or mired in complex and competing accounting procedures. In most cases, universities from both the Global North and South have well established, yet often very different accounting and auditing procedures, and are rarely allowed by their institutions to deviate from these established guidelines. For example, there were often significant differences regarding what constituted sufficient "due diligence" with regard to receipts, currency conversions and auditors' expectations. And these varied accounting procedures easily translated into thousands of U.S. dollars (or Botswana Pula) gained or lost by the respective institutions. For example, the designation of exchange rates, as well as the official day for the exchange rate to be calculated, significantly impacted the budget's "bottom line" by several thousand U.S. dollars.

It should be noted that these accounting challenges led to a substantial delay before UB finally received funds from UCF, as designated in their mutually agreed upon sub-contract. For example, though UCF students departed Botswana in early June, it was not until mid-September of that same year that funds were finally received by UB, a full three months "after the fact", (a delay involving endless email exchanges, invoicing, disagreements on exchange rates and inaccurate banking information). Given the fact that host institutions in the Global South often have limited resources, such delays and frustrations may place these institutions in a dire financial position. Bradley (2008) contends that asymmetrical relationships between Global North-South partners are key obstacles to productive and collaborative research, and that this asymmetry manifests itself in terms of inequitable access to information, training, funding, conferences, publishing opportunities, and the disproportionate influence of Global Northern partners in project administration, budget management, and the development of research agendas (p. 27).

Concluding comments

Clearly, to develop equitable and productive relationships that endure, this study underscores the need to operationalize the most effective approaches to identify and analyze key opportunities, challenges and dilemmas directly linked to quality partnerships which include programs based in emerging nations. To develop a workable consensus and long-term commitments between institutions and communities, as well as enhancing a program's end products, there is a critical need for all partners to maintain continuous formal institutional reviews that include all stakeholders. Moreover, Global North-South collaborative partnerships could also be enhanced by designing programs that are not only more beneficial to the host institutions and communities, but include them as meaningful stakeholders; thus

providing an effective platform for transformative-learning experiences for all involved.

In conclusion, there must be transparent and mutually agreed upon “terms of engagement” regarding the development, management and evaluation of project proposals, budgets, and Memorandums of Understanding (MOU). This will (hopefully) avoid situations where institutions from the Global South are cast in dependent roles, while their partners from the Global North maintain control of most, if not all of the project funds. Such apparent (if not real) inequities compromise the goal of mutual capacity building, a key element in Global North-South collaborative partnerships. Clearly, the goal of developing and enriching human resources, while providing opportunities to reap the rewards of a strong, equitable, and truly collaborative partnership, cannot be compromised by perceived (or real) inequitable relationships. Moreover, if we are to conceptualize and operationalize a form of globalization capable of enriching all stakeholders worldwide, it is imperative that we begin by reaffirming partnerships between the Global North and South that are truly equitable and collaborative, while recognizing the unique and invaluable qualities and strengths of all stakeholders.

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Providing Books to Rural Schools through Mobile Libraries

Abstract

International literacy tests, such as PIRLS show that South African primary school learners compare negatively with their peers in other parts of the world. Added to this, learners in rural schools in the country perform significantly worse than their peers who attend schools in urban areas, with the former learners also having other challenges, such as poverty and poorly resourced schools. In order to support literacy in South Africa, SAPESI and other partners initiated a project where mini-buses are converted into mobile libraries, and books are provided to schools without permanent libraries. This paper reports on research that was commissioned by the Free State Department of Education, and sponsored by the Flemish Association for Development Cooperation and Technical assistance, to appraise the work of these mobile libraries. Findings show a commitment by the staff involved to contribute to the development of marginalised learners attending rural schools.

Keywords: mobile libraries, literacy, rural schools

Introduction

Kofi Annan, former UN chairperson, once indicated that “literacy is a bridge from misery to hope ... a platform for democratization” (<http://www.goodreads.com/quotes/tag/literacy>). The ability to read with comprehension is essential, particularly in a developing country, such as South Africa. Yet Zimmerman and Smit (2014), based on the opinions of several authors, point out that the reading comprehension of primary school learners in South Africa is of a poor standard. South African learners performed far below par in both the PIRLS 2006 and the adapted prePIRLS 2011 tests. Van Staden and Bosker (2014, p. 7) recommend that in order to address this deficit, reading in the classroom, beyond the “formally scheduled reading time” during language lessons, is required to overcome this obstacle. According to Applegate and Applegate (in Van Staden and Bosker, 2014), teachers should create classrooms that encourage learners to engage in reading, and the teachers themselves should be role-models who enjoy reading. It is of particular importance to address this problem in rural schools as learners in these schools performed significantly lower in the abovementioned tests than their peers who attend schools in urban areas (Nkosi, 2012, p. 1). Nkosi (2012, p. 1) quotes Vijay Reddy, executive director at the Human Sciences Research Council (HSRC), who indicates that if “you improve [rural] schools you improve the national scores”.

The Free State province is one of nine provinces in South Africa, and regarded as a rural province. In the context of South Africa, there are different scenarios for rural schools. In all five districts, many schools are situated on farms some distance from towns. The majority of the learners who attend these schools live in dismal conditions, and most of these schools are quite small, often with only one or two teachers teaching all the grades. In two of the five districts in the Free State Province, a number of schools are also situated in the former “native homelands”, where people today still live in poverty and neglect (Gardiner, 2008, p. 9). Only

some of the schools have electricity and running water, and at many of the farm schools, learners and staff members have to use pit toilets as no proper ablution is available. Gardiner (2008, p. 14) argues that: “there is a crises in the whole of South African education system, and that this crisis is most serious among learners in rural schools”.

According to Nkosi (2012), Sarah Howie, the director of the Centre for Evaluation and Assessment and the research coordinator for PIRLS in South Africa, indicates that schools need resources to improve learner performance but many schools are without libraries. Paton-Ash and Wilmot (2015) confirm that only 7% of state schools have stocked libraries. In order to support literacy in South Africa and to address the deficit of infrastructure to provide reading books to rural schools, since 2007 SAPESE and other partners¹ have been sponsoring mobile libraries for all nine provinces in South Africa. In the Free State Province, these libraries are managed by the District Teachers Development Centre (DTDC) staff members. Towards the end of 2014, the Free State Department of Education, in collaboration with the Flemish Association for Development Cooperation and Technical assistance (VVOB) commissioned the University of the Free State to embark on a participatory action research project aimed to:

- improve research capacity within the DTDC;
- describe the work that the mobile libraries do; and to
- appraise the effect of the mobile libraries on schools and learners, towards improving their functionality.

This report provides a synopsis of the findings of this research project that will conclude in July 2016.

Methodology

We used a Participatory Action Research approach. The participants in the research projects are the resource coordinators, library subject advisors, library assistants, mobile library operators and teachers and principals in 10 of the schools that are visited by the mobile libraries. The study followed a qualitative approach, using interviews, documents, focus group discussions and observations as strategies to collect data.

Research and other training

In order to develop research capacity, and also to enable the project to have a participatory nature, a number of workshops were held throughout the project. Initially information about research was shared and then the details of the project were collaboratively planned. In follow-up workshops, the participants were provided with information in terms of data analysis and report writing, and an observation sheet was collaboratively developed to assist with describing how the

¹ Sony collects children’s books globally; The Japanese Ministry of Foreign Affairs provided funding; Mitsui OSK Line transported the mobile libraries from Yokohama to Durban; JTI SA and Sumitomo Corp. provided financial support; Honda SA provided generators; Volcano Advertising provided PR and Marketing support; Toyota SA, Nissan SA, Isuzu Truck SA and Mitsubishi Corporation provided vehicle maintenance support.

library books are used. One of the action plans that was implemented was the facilitation of a short workshop for mobile library operators and library assistants to bring them on board in terms of where the project was going, but also to provide them with particular information that they requested.

Findings

Functioning of the mobile libraries

The mobile libraries are mini-buses that have been converted into libraries. Books, mainly provided by the sponsors, are stocked on shelves on the inside of the vehicles, and in the case of the newer buses, also on the outside. The appearance particularly of the first set of buses is appealing. One participant stated “*The physical appearance of the bus is intriguing and seems fun for the learners. They give it joyful attention when we arrive*”.

Each of the five districts have one or two media subject advisors, a resource coordinator (experienced, senior, qualified educator) who, amongst other things, manages the mobile libraries in the district. Each district has 2 mobile libraries, each with a mobile library operator (driver) and a library assistant. The minimum requirements of these two posts are grade 12, and the mobile library operators must have an appropriate driver’s licence and annually obtain a public driver’s permit. Many of these staff members, however have post-school qualifications.

The mobile library operators are responsible for driving and taking care of the bus, and also help the library assistants when packing the bus with books from the stock-holding at the DTDC. As many of the schools that are visited are without electricity, the mobile libraries are equipped with generators. Each bus is equipped with a laptop, a scanner and a printer. From Mondays to Thursdays, the mobile libraries travel to different schools, where the library assistants issue books to the school using an electronic issuing system (LIBWIN). The school then receives a printout of all the books that are issued. Upon return to the DTDC, the data are transferred to the mainframe of the LIBWIN system.

Owing to the many schools that are visited (between 50 and 80 schools per district) and the distances that the mobile libraries have to travel, schools are usually visited between one and three times a term. When the mobile libraries visit the schools again, they collect the previous books, and new books are issued. At some schools, the teachers select the books, and at others, learners are invited onto the bus to select books. It often happens that the Intermediate Phase learners and their teachers select books, while the Foundation Phase teachers select books for their learners. Most teachers keep the books in their classrooms, in what they call corner libraries (mainly a simple carton box or a desk). Even if a particular pupil selects two or three specific books, in the end, all the other learners in the class are afforded the opportunity to read them, because they returned to the corner library. At only a few schools are the learners allowed to take the books home, as the teachers are concerned that the learners will not return the books in good condition.

At the start of the term, the school visit programme is given to the schools. This is a challenge in itself, because communicating with the schools is problematic (no landline, fax machines or email facilities available). Mostly, the mobile library staff

members confirm their visit in the morning by calling to a teacher's cellular phone, although this is quite costly.

Each DTDC centre packs and organises the bus according to needs in that particular district. At most centres they use a combination of the Dewey classification system, and age appropriate reading (splitting Foundation Phase and Intermediate Phase fiction). In some of the buses the books are also sorted according to language. Often the books are packed with only the backs of the books visible, but in others, books are placed "*with the cover facing the teachers. It saves time and they can immediately see what is available*". The library assistants and the resource coordinator jointly plan which resources to load, as the resource coordinator is the one with the knowledge about the teaching profession while the library assistants know the needs of the schools.

Value of the mobile libraries

When the mobile libraries get to the schools, it is not just an administrative exercise of issuing books. The mobile library operators and library assistants usually interact with the learners. They will talk to the learners about the books, and inquire about why they chose a particular book. Sometimes the mobile library staff member will "*pick a book and ask a learner to read to them*". The positive, inviting and caring manner in which the Mobile Library staff members engage with the learners needs to be noted.

The library assistants and the mobile library operators know their resources well and are able to assist and advise the teachers on particular books, as one of them explained: "*I help the learners and the teachers to choose the books that they need to help them to be more efficient in the class*". Furthermore, the libraries specifically stock non-fiction books that "*educators can use in order to empower themselves*". In general, there is no shortage of books, as was explained by a participant: "*Fortunately SAPESI and SONY International assisted in getting donations to stock the mobile libraries. We really have a lot of books to ensure that the service to schools will continue*".

The mobile library staff members are convinced about their goal:

"We want to improve reading, especially English. Being able to communicate in English will improve the experience of learners in other subjects as English is the language of teaching and learning."

The participants are convinced that the service makes a "*difference in the learners' lives by improving literacy in the rural areas*". Classrooms have been converted to a print-rich environment. When the bus visits the schools, sometimes the teachers will call a learner to read to the class, but also the library staff members will ask some children to read to them, or tell them about the books that they have read.

In terms of how strategies are used by teachers, a participant explained that "*most of the schools have a reading period, and they use the mobile library books for that ... reading to improve reading skills and vocabulary*". In many of the multigrade classes, the books are furthermore, a great help to the teacher. When the learners of one grade are actively being taught by the teacher, learners from other grades get up and fetch a book from the library corner to read upon completion of the work that was given to them.

Most schools are keen to join the project, because of what they gain. One principal at a school that had not been serviced by the mobile library previously, explained their understanding regarding the mobile libraries as follows: “*[it is] a library brought to school to offer schools and learners access to some of the resources*”.

While this is a remarkable project, it has its own challenges.

Challenges and concerns

The long distances that library staff travel and particularly, the gravel roads that are in a poor condition, can be hard on the staff members, but also on the vehicles. They often have to deal with breakdowns. On the positive side, some of the service providers that are contracted at the centres provide speedy and excellent service to get the vehicles back on the road again.

Although the participants appreciated the number and the quality of the books that they have available, more books written in African languages are needed. Furthermore, some concerns were raised regarding the books that learners select.

Many intermediate learners take out only very simple books, and often Walt Disney stories only. The library staff believes that due to television, they might be familiar with the story and believe that there must be a way of encouraging them to read unfamiliar stories. Furthermore, primary school learners seem to be under the impression that they must borrow only story books. At one school that I visited, the teachers were upset because a primary school learner took a large non-fiction book that did not fit into the library corner. The learners were then explicitly instructed to select only small books. On the other hand, secondary school teachers seem to believe that their learners are supposed to take out only non-fiction books. One participant explained: “*Secondary schools only take non-fiction books, claiming that learners need those. This prevent the learners from reading for enjoyment.*”

The mobile staff expressed their unease about many teachers rigidly sticking to the departmental workbooks and wanting the learners to read only curriculum related materials.

In view of the challenges and concerns mentioned, and the nature of participatory action research to take action towards improvement, I need to note a number of initiatives and strategies that emerged.

Strategies towards improvement

The mobile library operators and library assistants are key factors in the success of the mobile libraries. It seems that the different resource coordinators take it upon themselves to contribute to the development of these mobile library staff members. One of the library assistants explained: “*Since I started here, we go to various workshops where they taught [sic] us how to use the books*”. During the research project, the UFS also provided the mobile library operators and library assistants with some training, although a number feel that they still need further clarity on reading strategies and on dealing with difficult customers and unresponsive schools.

In one district the mobile staff members are planning to prominently display some non-fiction and various age appropriate story books to stimulate interest. In addition, some mobile library operators and library assistants have decided to talk informally to the individual learners while they are browsing through the displays

and point them to some books, based on the interests of the learners. One resource coordinator decided to address this at the next training opportunity for the teachers at the DTDC. One district furthermore, wants to also involve parents, and is thus planning “*a road show, maybe at a large school, and invite the parents. It is important that they see the value of reading*”.

It was suggested by one of the staff members that the resource coordinators should specifically provide “*a workshop for the farm school teachers on how to use library books complementary to the curriculum books*”. Flowing from this, a group of research participants a training programme on how to use resources effectively in the classroom is being developed by.

It is a problem that schools do not want the learners to take books home, thus the one district is in the process of obtaining kits from a NGO called READ that will show the learners how to take care of library books.

To overcome the challenge of books often not being available in the African languages, some districts mentioned the possibility of doing translations of the English books that are available for Foundation Phase learners, and paste these on the same page as the English print. Not only will that allow learners to read in their mother tongue, but also create the opportunity for them to acquire English at the same time. This possibility needs to be followed up.

Even though it is not their responsibility, most of the mobile library operators see their task as beyond the driving of the buses. They also engage with the learners when they come to the bus to collect books and in that way, become a second library assistant providing service to the schools. Similarly, some of the library assistants also have the required driving licences and PDP licences, thus assisting with the driving of the buses.

Conclusion

The aim of the mobile libraries is to provide the learners and teachers at rural and farm schools with books, and that is what they are doing as best as they can. While the mobile libraries cannot make up for challenges in teaching and learning or in infrastructure, the learners and the teachers are provided with resources to encourage reading and stimulate literacy development. The importance of the role the mobile library operators and library assistants play, is invaluable. As these people are the link between the books and the children, their professionalism and enthusiasm need to be applauded. This endeavour truly serves as an example to the international community about providing education to marginalised children.

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Juliana Smith & Agnetha Arendse

South African Curriculum Reform: Education for Active Citizenship

Abstract

The changing societal context in South Africa (SA) has necessitated curriculum reform to deal with the challenges of education, from apartheid to democracy, with the aim of promoting active citizenship education. The aim of the paper is thus to illuminate to what extent the Grade 11 Life Orientation (LO) curriculum prepares learners for active citizenship in a democratic South Africa.

The research on citizenship education adopted a qualitative interpretive approach and a case study as the research design. The findings suggest that there is a lack of knowledge and understanding of concepts relating to active citizenship which constrain effective preparation of learners for active citizenship in a new democracy. Recommendations refer to a focus on curriculum development and a framework to inform active citizenship policies and structures applicable to the education system.

Introduction

Prior to 1994, the South African education system was racially divided into 19 racially segregated education systems (Carrim, Pendlebury & Enslin, 2000). Since 1994, the transition from apartheid to democracy required the need for a more non-racial education system encapsulated in one national curriculum (Daun, Enslin, Kolouh-Westin & Plut, 2002). The Constitution of SA provides the basis for transformation since it is the cornerstone of democracy in SA (Constitution of the Republic of SA, 1996).

From the onset of the first democratic elections, the South African education system has undergone many curriculum changes through conscious efforts to include citizenship or human rights education in national school policies (Schoeman, 2006) including an Education White Paper 6 (DBE, 2011a; 2011e).

Drawing on the study of Arendse (2014), this paper explores aspects of curriculum reform in SA during democracy particularly with reference to the emergence of citizenship education in the LO curriculum.

South African curriculum reform

Introduction

The Bantu Education Act, passed in 1953, resulted into apartheid education which was used as one of the strategies to maintain the racial imbalance (Phillips, 1999). Uprising in 1976 against the oppressed system, and school boycotts in the 1980s (Kallaway, 1986) brought about the framing of alternative conceptions of education which included key features and principles of citizenship or human rights education (Cooper, 1998).

The first non-racial national curriculum was introduced in 1997, namely Curriculum 2005 (C2005) and was considered to be the uniting vision for

transforming apartheid education in SA (DoE, 1997). The Revised National Curriculum Statement (RNCS) and the National Curriculum Statement (NCS) were introduced in 2001 and 2003 respectively for the General Education Band and the Further Education and Training Band. For improved implementation of the curriculum, the NCS was amended and the Curriculum Assessment and Policy Statement (CAPS) Grades R – 12 was developed. It serves the purpose of equipping learners, irrespective of their socio-economic background, race, gender, physical ability or intellectual ability, with the knowledge, skills and values necessary for self-fulfilment, and meaningful participation in society as citizens of a free country (DBE, 2010).

Life Orientation curriculum

The LO curriculum (DoE, 1997a; 2000; 2002) became a compulsory subject after 1994 when SA became a democratic country (Sedibe, Feldman & Magano, 2014). LO is defined as the study of the self in relation to others and to society which addresses skills, knowledge, and values about the self, the environment, responsible citizenship, a healthy and productive life, social engagement, recreation and physical activity, careers and career choices (DBE, 2011a; 2011b; 2011c; 2011d). LO is constituted to play a fundamental role in education for human rights education and is regarded as the advancement of human rights based principles (Rooth, 2005; Carrim, 2006).

LO promotes civic participation, gender equity, non-discriminatory and democratic behaviour, and opposition to stereotyping, discrimination, bias, prejudice and racism. The LO curriculum aims to develop the learner holistically and to empower the learner to optimally participate in a just society (Wasserman, 2014).

Education for active citizenship

The transformation of the education system included the promotion of fundamental principles of citizenship education which promotes equality, non-sexism, non-racism and non-discrimination (Arendse, 2014).

A national curriculum was introduced which promoted the values of non-racism, non-sexism and democracy, and one which was based on a human rights framework (DoE, 1996). Each subject would thus address issues relating to human rights with its aim to infuse a culture of human rights within the curriculum (Roux, 2012) which focuses on the nature of change together with the need to participate in the process of social transformation (Volmink, 1997).

Conceptual framework

The study provided a conceptual framework which investigated the following concepts:

Citizenship education

Citizenship education can be defined as educating children, from early childhood on, to become clear-thinking and enlightened citizens who participate in decisions concerning society (UNESCO, 1998). It generally involves enjoying rights and responsibilities in various contexts and emphasises the notion of participation in

various activities including political participation in a democracy (Pinnington & Schugurensky, 2009; Butts, 1988: 187; Barber, 1992: 36).

Citizenship education aims to instil respect for others and recognition of the equality of all, and attempt to combat all forms of discrimination by fostering a spirit of tolerance and peace. It includes educating people in citizenship and human rights through an understanding of the principles and institutions; learning to exercise one's judgement and critical faculty; and acquiring a sense of individual and community responsibility (Meyer, 1995).

Human rights education

Human rights education is viewed as the basis for a universal human rights culture so that individuals and groups learn to respect their own rights and dignity as well as that of others (Hodgson, 1998). Human rights education is a way to deal with transformation and is an empowering process enabling people to take control of their lives (Tibbitts, 2003) and participate meaningfully in a democratic society. Holistically, human rights education should entail knowledge, skills, values, behaviour, feelings and attitudes, as well as development (MacKinnon, 1993: 83-109). Finally, human rights education should aim to educate equip and empower citizens to use their human rights to improve their lives.

Democracy education

Democracy education promotes the notion of encouraging the people's voices to be heard and supports the notion of agreement and representation (Carrim, 2006). Ideally learners within the education system should be targeted because there is an assumption that schools prepare learners for life, and this must be reflected within the school curriculum (Council of Europe, 1987). Educational sites are ideal since it represent the most peopled social space in the country (Carrim & Keet, 2006). Young citizens should be educated and nurtured to become democratic citizens who are able to contribute to and enhance a democratic society (Linington, Excell & Murris, 2011).

Inclusive education

Inclusive education, with its roots in the Universal Declaration of Human Rights (UN, 1948), states that everyone has a right to education that shall be directed to strengthen human rights and freedoms (UNESCO, 2005). It is generally viewed as a context within which ordinary schools include a diversity of learners, or as a system that ensures that learners with disabilities are accommodated within mainstream education (Clark, Dyson & Millward, 1995: 78-95; Uditsky, 1998). In SA inclusive education is viewed as a learning environment that accommodates and promotes diversity unconditionally and without discrimination of any kind which acknowledges, accepts and respects the idea that all learners can learn and that they are diverse, and strives to maximise learner participation and potential (DoE, 2001).

Global perspectives

Citizenship education has different meaning in different contexts including the related domains such as democracy, human rights and inclusivity. It is referred to as

aspects of education at school level intended to prepare students to become active citizens, by ensuring that they have the necessary knowledge, skills and attitudes to contribute to the development and well-being of the society in which they live (European Commission, 2012).

Civic education in America is dominated by the study of democracy, the Constitution, democratic values and citizens' rights (Cogan & Morris, 2001). Mexico emphasises the development of democratic citizenship skills and habits (Levinson, 2004: 269). Mexico looks to the school to engender democracy in learners. In Japan, citizenship education is used to build on and enhance a democratic society and is nurtured in the school curriculum through various school activities (Otsu, 2001). Taiwan, with similar objectives, aims to develop good citizens and encourage students to live responsibly, peacefully and in harmony with society (Pitiyanuwat & Siyiva, 2001).

Australia aims to prepare their youth to become active citizens through an understanding of its democratic system of government, as well as by keeping to the values required to participate actively in civil life (Print, 2001). In New Zealand, citizenship education aims to enable learners to participate in a changing society as informed, confident and responsible citizens (New Zealand Ministry of Education, 1997).

Research methodology

The study, on which the paper is based, adopted a qualitative research paradigm and a case study research design with an interpretive approach to obtain an in-depth understanding of the phenomenon of citizenship education in a democracy.

Participants were drawn from 5 secondary schools in the Western Cape, SA. The participants included 461 Grade 12 learners who completed the Grade 11 Life Orientation curriculum and 7 Life Orientation educators. The case study provided the opportunity to closely examine the data in its specific context over a period of time (Yin, 2003; Merriam, 1998; Zainal, 2007).

Data was collected mainly through document analysis, focus group interviews and semi-structured questionnaires. The questionnaires were used to gather large amount of data from a large sample and the focus group interviews elicited rich in-depth data from the perceptions and experiences from the learners and educators. Documents from the Department of Education were readily available and also provided relevant information about the phenomenon. The research instruments were specifically used to answer the research question: "To what extent does the Grade 11 LO curriculum prepare learners for active citizenship in a democratic South Africa?". The data collected from different sources using different instruments was crystallised to validate the responses to the research question (Tracy, 2010; Ellingson, 2009).

Discussion, results and findings

The transition from an apartheid system to a democratic system required radical interventions which required, amongst others, transformation in education. New policies and mechanisms were put in place to address the inequalities of the past. The education system has therefore introduced the infusion citizenship, human

rights, democracy and inclusivity into the curriculum, and in particular the LO curriculum in the NCS. The rationale for introducing these in schools was to develop a nation of competent and caring citizens who can participate meaningfully in society and achieve their full potential (Rooth, 2005). The LO curriculum has thus been given the responsibility to include citizenship - democracy - inclusive - and human rights education in order to fundamentally promote and encourage active citizenship in a democracy (Arendse, 2014).

Arendse's (2014) study demonstrates that the lack of knowledge, skills, values and understanding of 'active citizenship' and related concepts including 'human rights', 'democracy' and 'citizenship' was due to the marginal infusion of content relating to active citizenship in the LO curriculum.

The findings illustrate that the curriculum provides insufficient guidelines, infusion, content and time for the teaching and learning of active citizenship in a democracy. Learners are not being exposed to practical activities to empower them to become active and responsible citizens in a democratic society.

Despite the inclusion of human rights education, democracy education, inclusivity and citizenship education in the curriculum, there was thus a deficiency of information, specifically about these aspects of the curriculum as they relate to active citizenship in a democracy. This is evident that learners are not being effectively prepared and equipped for active citizenship through the curriculum.

Recommendations

The following recommendations pertain to the curriculum as a mechanism to optimally educate, equip and nurture learners and educators for active citizenship in a democratic SA:

There should be collaboration between democratic structures (participatory institutions) and the DBE when developing active citizenship education curricula in South Africa in order to nurture citizens who become active and responsible in society.

A paradigm shift may be required within the DBE, including districts and schools for LO as this subject is pivotal to the facilitation of the holistic teaching and learning of active citizenship in a democracy.

Curriculum development policies should classify the significance of active citizenship in the curriculum by designing explicit topics relating to active citizenship. A citizenship education curriculum should be more explicit in the content and information presented to learners from as early as Grade R.

The curriculum plays a pivotal role in creating a society that embraces active citizenship in a democracy and should thus be designed in such a manner that learners are effectively prepared to become responsible and active citizens in a democratic society.

More time should be allocated to the teaching and assessment of human rights education, democracy education, citizenship education and inclusivity.

Active citizenship training for all educators is essential since aspects relating to active citizenship are integrated across all subjects.

Conclusion

Education is the key to cultivate active citizenship in a democracy and therefore curriculum reform be taken seriously. Citizenship education as it relates to active citizenship in a democracy should aim to educate, equip and empower citizens to use their human rights to improve their lives as active citizens in a democracy.

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Universities Response to Oil and Gas Industry Demands in South Texas (USA) and Tamaulipas (Mexico)

Abstract

Given the importance of hydrocarbons for this area, the purpose of this paper is to explore the response of universities to cope with new demands in the south of Texas and Tamaulipas, especially in relation to gas plays of Eagle Ford (Texas side) and Burgos Basin (Mexican side). To accomplish this task, in the first section of the paper a broad review of selected Texas universities is done, distinguishing their most relevant moves during the last three years. In the second section we do the same for the higher education institutions in the State of Tamaulipas, México. In the third and last section we end up with some final comments about the response of universities to cope with energy sector new demands in both sides of the border. Although related to research, in Texas the response of universities is diverse and also disperses; whilst in Tamaulipas the response mainly consists of new education provision to train human capital.

Keywords: hydrocarbons, higher education, Texas, Tamaulipas

Introduction

The border between United States of America and Mexico is acknowledged as an area of intense bilateral relations, in such a way that it is difficult to make a clear-cut separation in terms of ethnicity, culture or skin color (Sepúlveda, 1958). According to 2009 Census of United States, 94% of the population in the border held a Mexican identity. Furthermore, besides demographic similarities it is also acknowledged that in the area there is an old and growing economy across the border and through the mass media, commerce and services (Kilburn, San Miguel & Hoon Kuak, 2013).

The public announcement of natural gas new reserves and the reforms to the energy sector initiated by Mexican government in 2013, introduced new relations in the dynamics of the border with a growth of operations in Mexico by companies from the south of Texas, posing new demands to universities, since they are called to train the human capital needed for the different levels and aspects of hydrocarbons exploitation (Gil Valdivia, 2013), for researching on the quality and efficiency of technological processes as well as on its social and environmental impact (Barnés de Castro, 2013).

Once the region's oil and gas reserves were announced, actions were taken by universities in both sides of the border. The information used in this section was gathered by the author from institutional web pages and from interviews conducted during the months of October 2014 and February 2015. The aim of these interviews was to explore opportunities for mutual academic collaboration.

Given the importance of hydrocarbons for this area, the purpose of this paper is to explore the response of universities to cope with new demands in the south of Texas and Tamaulipas, especially in relation to gas plays of Eagle Ford (Texas side) and Burgos Basin (Mexican side). The former is located within the nine world's

major hydrocarbons exploitation fields in terms of probable reserves, and the latter with a probable reserve of 545 billion ft³ of Shale gas and 13 million barrels of oil, making this Mexican region the third most important in the world (Redacción SDPNoticias.com, 2014).

To accomplish this task, in the first section of the paper a broad review of selected Texas universities is done, distinguishing their most relevant moves during the last three years. In the second section we do the same for the higher education institutions in the State of Tamaulipas, México. In the third and last section we end up with some final comments about the response of universities to cope with energy sector new demands in both sides of the border.

Although an exploration of universities' reactions are observed in two countries, strictly speaking this is not a comparative education study. The units of comparison are not clear-cut selected. Neither are the states of Texas and Tamaulipas nor all of their universities, what we are comparing. Nevertheless, the essay's content belongs to the realm of international education and it is useful in order to explore some opportunities for collaboration and strengthening relations between educational institutions of these neighboring states.

The response of institutions in Texas

Higher education in Texas includes 146 public and independent universities, from which 50 are *community colleges* with multiple *campi* (they offer two year programs and labor certifications); 38 are universities and public centers, 38 are independent universities and are related to health sector (Texas Higher Education Coordinating Board, 2013). A good part of public institutions are grouped in two systems: Texas A&M University and University of Texas.

The Texas universities selected for this initial exploration are those which are closer to the border with Tamaulipas: Texas A&M University International, Texas A&M University at Kingsville, The University of Texas at San Antonio and The University of Texas Rio Grande Valley. The reason for this selection was basically because are the ones situated in the surroundings of an area of hydrocarbons near to the Mexican side known as Eagle Ford and have made explicit their interest to produce personnel and knowledge for the energy sector.

Texas A&M International University

Texas A&M International University is located in Laredo, Texas, about ten miles from the city of Nuevo Laredo, Tamaulipas. It was born in 1970 as University of Texas A&I, with an offer of two year educational programs. It was until 20 years later when this university became part of the Texas A&M system, but it was until 1994 when it was granted the category of international, to implement graduate programs in conjunction with Mexican and Canadian institutions.

The international activity of this university has been especially remarkable during the last three years, thanks to its Binational Center created at the beginning of this decade. This is the office in charge of global initiatives and has produced a substantial amount of energy related activities with the National Association of Universities (ANUIES) and especially with the universities of the neighboring Mexican states of Coahuila, Nuevo León and Tamaulipas, like round tables and a consortium of universities, institutions and enterprises.

As a dean of the engineering department, the university hired a retired professor who was one of the seven members of the Mexican Commission of Hydrocarbons, and one of his first actions was to set an agreement with the Engineering Department of Texas A&M University at Kingsville, to develop joint activities related to hydrocarbons.

University of Texas at San Antonio

In accordance with an interesting strategic plan, University of Texas at San Antonio (created in 1969) is focused in ranking's tier1, which means to become a research university. For that, it is renewing research centers and hiring new personnel like an outstanding Mexican researcher on the fields of physics and nanotechnology, and very familiar with science policies and research agencies in Mexico.

For the International Affairs Office, this 29 thousand students institution, hired another Mexican who previously held a position as provost for academic affairs in a research institution specialized in border issues such as migration policies and regulations.

Texas A&M University - Kingsville

At the beginning of the twentieth century this institution was a teachers college and in 1929 became Texas College of Arts and Industries, and entered Texas A&I in 1967. It was until 1989 when this university became part of the Texas A&M system and rapidly included new academic programs, especially in sciences and engineering, highlighting Natural Gas Engineering.

Integrating scholars from different departments, in august 2013, the engineering school established the Eagle Ford Center for Research, Education and Outreach, to promote research capacities and faculty development; to organize workshops for promoting communication among academia, community organizations, industry and government about Eagle Ford Shale and technical aspects with a sustainability approach.

The first courses offered by the Center were directed to professionals already working in this field but wanted to broaden their knowledge and abilities related to supply, flows and treatment of waters associated with "fracking"; solid waste management and soil remediation; assessment and control of air quality; and meetings with communities affected by the development of shale gas extraction.

It is very interesting that the strategic plan of this institution is devoted to the improvement of English language of the students, allotting all kinds of resources, infrastructure, and faculty development. English writing is an important issue for this university since a large proportion of students enrolment comes from abroad, especially from Mexico and Middle East.

The University of Texas Rio Grande Valley

Since autumn 2015, this university is the result of two universities merging: The University of Texas at Brownsville and University of Texas Pan-American together with the Regional Academic Health Center. The former, under the name of Southmost College, during a long period of time only offered two year programs. It was recently when the process of integration with UT Panam had begun receiving

students to proceed with four year programs, although there were also some merging graduate programs.

Within the south of Texas context and the UT system, this merging is very interesting, and although no energy program is set up yet, the new university is announced as a bi-national and bilingual institution. With no doubt this university will attract even more Mexican border students and will facilitate, in due time, their transfer to other universities of the same system.

The response of institutions in Tamaulipas

In Tamaulipas, the higher education system holds 103 institutions, some of them with schools and departments in different cities of the state: 70 are private institutions, 12 are federal and state public institutions, 12 are state, 8 are federal and 1 is autonomous. All of them have a total enrolment of 111,518 students, distributed in 14 municipalities.

On September 10th, 2014, the governor Torre Cantu presented the Tamaulipas Energy Agenda, which incorporates with a high priority level, the subject of human capital and identifies some educational programs of different levels, as well as an amount of professionals that will be needed by the development of the energy sector; the document also states a list of training programs for high school level.

With the title of “Reorientation of education provision” the agenda states a number of educational programs related to the energy sector. It is expected that their curricula will be reviewed for their alignment to human capital demands. These programs are supplied by public institutions in different localities of the state of Tamaulipas.

The publication of the agenda was crucial for higher education to take decisions on designing and reviewing educational programs related to the energy sector. Although the response of these institutions was done on an individual basis, there is some evidence that they are being driven towards some forms of grouping.

Technological institutes

In this state there are six technological institutes located in Ciudad Madero, Mante, Ciudad Victoria, Nuevo Laredo, Reynosa and Matamoros. By September 2014, they were integrated to the Tecnológico Nacional de México and the institutions became its local expressions to be regulated by a General Direction. The capacity of local institutions for an independent decision making has its limits and the new organizational arrangement does not solve the old problem of centralization and instead of designing new programs they will refresh an old program, such as the one of engineering in renewable energies.

Polytechnic universities

This group includes the ones located in Altamira, Ciudad Victoria and the *Region Ribereña*. Only the first of the three runs the program of Engineering in Energy. Its curriculum has a special mention of electrical engineering. The other two universities run mechatronics in Victoria and Industrial engineering in the northern border. Those programs are the closest to the energy sector.

Private universities

On the other hand, under less controls than public universities, seven private institutions are already receiving enrollments for 13 undergraduate and graduate programs in fields like hydrocarbons and renewable energies, and in an important number of engineering programs, although some of them with a weak basic infrastructure for operations.

In a follow up exercise, carried out in April 2015, educational authorities of Tamaulipas presented another list of programs: 98 of them were identified as new (9 professional associate, 41 undergraduate, 4 specialties, 29 masters and 15 doctoral programs) and 31 to be reoriented (9 professional associate, 10 bachelor's degrees, 2 specialties, 8 masters and 2 doctoral programs). All of them will start operations between 2015 and 2016.

Meanwhile, since previous months, the autonomous university of Tamaulipas was developing a process of updating the curricula of all programs of professional associate and bachelor's degrees. In May 2015, the university authority approved the updating of 63 programs, denomination change of 7 programs and 20 brand new programs (11 bachelor's degrees and 9 professional associate) and the ending of 11 bachelor's degrees.

In reference to the programs related to the energy sector, logistics engineering, geomatics engineering, renewable energies engineering, economics and sustainable development were added to the programs of oil engineer and petrochemical processes engineer; and as new professional associate programs were added: management of energy business, harbor administration, logistics, geological exploration, hydrocarbons, solar energy and environmental remediation.

Besides educational programs, the autonomous university develops research activities related to the social and environmental impact of the energy activities; and also develops some contracts to develop technological services for energy public and private companies.

Final comments

The purpose of this paper was to explore the universities response to gas industry demands in both sides of Texas-Tamaulipas border as part of a larger project with a larger objective related to gather information useful for human capital planning for the energy sector as recommended by experts (Dominguez Vergara, 2013).

It is observed that on the side of universities in the south of Texas, their affiliation either to Texas A&M or UT systems, did not refrain them from individual reactions to cope with the agenda, it seems to be that in this context there is a relationship of collaboration and competence that in one side allows them to participate not only of a financial fund (Permanent University Fund, 2014), but also of a source of prestige, as it is the trade mark of both university systems.

It is also observed that the Texan universities response was not a new provision of educational programs related to oil and gas industry, but the implementing and revitalization of research and development centers; so as the revitalization of the relationship with universities of the Mexican side of the border. This difference is clearly related to the asymmetries between the countries.

As a matter of fact, their strategic plans go by different pathways. Texas A&M International University increases relations with universities and companies in the

Mexican bordering states through the Binational Center; UT San Antonio moves towards a research university tier; Texas A&M Kingsville emphasizes its institutional development by developing English language of the students; while UT Panam merges with UT Brownsville to become a comprehensive university in terms of enrolments growth and diversity of programs.

Texan universities are hiring senior Mexican scientists with a deep knowledge and experience in higher education and the Mexican energy sector. On the other side, Mexican institutions generally reacted through the provision of undergraduate educational programs, although, in the case of the autonomous university with research and service programs, as well.

As in the south of Texas, the reaction of higher education institutions, to cope with new demands, was individualized. It was not a system reaction. Although Texans as well as Tamaulipas' institutions are grouped by subsystems, there is not a systems approach for the strategic planning of institutional development.

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Marco Aurelio Navarro & Ruth Roux

Goals That Melt Away. Higher Education Provision in Mexico

Abstract

The paper describes the growth of Mexican higher education in relation to political economy of the country from the decade of the fifties until present time. The historical analysis looks the moments in which major changes have been introduced to produce important effects in enrollments. The aim of this paper is to show how the provision of higher education opportunities is related to the fate of a development model followed by the country and how, when losing control of economy, its national goals escape between the fingers.

Keywords: higher education, growth of opportunities, Mexico

Introduction

The aim of this paper is to show how the provision of higher education opportunities is related to the fate of a development model followed by the country and how, when losing control of economy, its national goals escape between the fingers. The paper describes the growth of Mexican higher education in relation to political economy of the country from the decade of the fifties until present time. The historical analysis looks the moments in which major changes have been introduced to produce important effects in enrollments. We look to the impact that growth in basic education during the sixties had in higher education fifteen years later. The financial crisis of the eighties that brought a des-acceleration of enrolments growth but there were no funds to cover deficits in infrastructure in the context of new demands. This growth with no financial support provoked doubts about the quality of higher education services and private institutions mushroomed.

With the arrival of a new century, there was a change of the ruling party and the new regime created more than one hundred universities. With the goal of raising the participation rate from 26 to a 40%, with this a new political goal has been posed; the government very recently declared the pre-university level as compulsory and there are some effects that can be foreseen for the years to come in relation to access to higher education.

The neoliberal arena

Until the middle of the decade of the fifties, the Mexican economy had grown at an annual rate of 6%. This allowed for growth in infrastructure for the industrial sector and for saving some internal revenues to have an increase in employment and in real salaries. At that time, this growth, plus the finding of new oil deposits, made of Mexico a good recipient for external loans in such a way that the payment of debt's service consumed up to a 13% of incomes from goods and services export. But for 1982, a suspension of new loans brought about a lack of confidence and with this, a period of monetary depreciation and instability started (Urquidi, 1996). During 1983, a structural adjustment was initiated with a negative impact on the

employment figures and the value of salaries. Social gaps were widening with an effect of the already existing polarization of society. In 1985, Mexico enters to the General Agreement on Tariff and Trade (GATT).

The period from mid-seventies to mid-eighties was crucial. A big amount of financial capital flew away, there was a devaluation of Mexican currency, an international decrease in oil prices, a growth of the external and the internal debt; but in contradiction to neoliberal thinking, the presidential period of De la Madrid ended up with the nationalization of the banking system. From a neo-liberal perspective this decision was paradoxical, although during the next governmental regime it was “amended”; but it is important to notice it since, in a way, it symbolizes the kind of contradictions that will characterize the implementing of neoliberal policies in Mexico.

Even when the initiative for economic restructuring obeyed to the obsolescence of the Mexican model of “stabilizing development”, the neo-liberal agenda was on its way: a reduction of state intervention in economy, privatization of public enterprises, decentralization of authority, deregulation and downsizing of bureaucracy, marginalization of labor unions, minimization of subsidies and protection to population (health and education) and the devise of welfare programs for the poverty generated by this same agenda (Latapí, 2008).

The next federal regimes were much aligned to this agenda using a discourse of modernization in support of structural adjustment, implementing mechanisms and agreements with different interest and pressure groups to control inflation, to control growth in salaries, to have a more efficient and clear use of public finance, so as to reduce public spending in social services.

During the regime of Salinas de Gortari (1988-1994) policies were more clearly defined to promote “modernization”. During his administration, the North American Free Trade Agreement (NAFTA) was arranged with the intention to articulate the economies of Mexico, United States and Canada; and the admission of Mexico to the Organization for the Cooperation and Economic Development (OCDE) was completed.

For that time, the inequalities and levels of poverty were unbearable. The first day of the year of 1994 represents, symbolically, the beginning of a new stage of the tensions and contradictions of neoliberal economic and social policies. That date was stipulated as the beginning of operations of North America Free Trade Agreement (NAFTA), and during the first minutes of the day, when members of the cabinet were still celebrating new year’s eve, the President was informed that the Zapatista Army of National Liberation had declared war to Mexican government and its neoliberal policy. Sub commandant Marcos had initiated an armed attack to military forces located in the mountains of the state of Chiapas. All over the country, the diverse manifestations of the conflict polarized opinions and political expressions and mobilizations, either in favor or against the Zapatista Army. Years later, in 1999, the students at the national university stood for a long period of strike against a move to raise students’ fees.

Social movements, as the above mentioned examples, to resist neoliberal policies, have refrained governments from introducing abrupt changes “from above”. Instead, cautiously the actions taken have been different for every sector. In the case of the higher education, different organisms and instruments have been set up to mediate relationships between universities and government. As it will be

reviewed in the next sections, incremental higher education policies have been operated, with no significant changes in contents, even with the shift of the political ruling party at the federal level, over the change of the century (Navarro Leal, 2009).

Growth of higher education system

In Mexico, most of the higher education institutions were created during the second half of the last century. But since the decade of the seventies, this education level initiated a process of accelerated expansion. During that decade the number of higher education institutions grew from 80 to 260 and undergraduate enrolments grew up from 80 thousand to a more than a million students. The participation rate of the age group went up from 2.7% to 13.1%, while the number of faculties went from 10 thousand to 80 thousand (Casillas, 1993).

For the next decade, the eighties, the rate of expansion went down, given that the governmental expenditure in education was reduced in more than 30%. The proportion of federal expenditure in the education sector went down from 21% to 16%, and one of the most affected lines was the salaries (Kent, 1996). As Lopez (1996) pointed out, faculties and researchers initiated an exodus towards different economic activities with better wages.

These financial cuts made hard to continue with building of classrooms, acquisition of equipment and labs, hiring more faculties. The problem generated by the fiscal deficit acquired a mayor dimension from the perspective of quality demands to universities in the new competitive scenario of globalization. Financial restrictions put pressure in public universities to look for different sources of revenues, among others: existing student fees were raised and some other fees were created for the use of labs and gyms; many of the graduate programs started functioning on student fees, and still are. Just like in the private institutions.

Nevertheless, expansion did not stop. In 2006, there were 1892 higher education institutions, 713 were public institutions, and 1179 were private. In the school year 2004-2005, a total of 2,538, 256 students were enrolled; 1,707,434 (67.3%) in public institutions and 830,822 (32.7%) in private institutions.

For the school year 2010-2011, enrolments of higher education were above three million of students, from which about 9% were attended through distance education programs (Tuirán, 2011). About one third of undergraduate enrolments were in private institutions, as well as 40% of graduate students. It is important to mention that during the last governmental period the public sector was accelerated, going from an enrolment of 2.5 million in 2006 to 3.1 million in 2012. A 70% of this growth was due by means of the creation of 92 new institutions, such as technological institutes, technological universities, and polytechnic universities, as well as new campuses or existing state universities (Rodríguez Gómez & Ordorika, 2012).

For the purpose of this paper, the figures presented give an idea of the dimension of the growth that Mexican higher education has had during the last decades, but in spite of this growth, and contrary to what has been happening in another sectors, where neoliberal policies impinged deeper (like in communications, for instance) the private sector of higher education has kept the same proportion of about a third of the enrolments, proportion that is different from other countries, like Brazil, where the private sector has grown to become larger than the public, at least to what student enrolments is concerned.

But the above figures also show that Mexican public higher education went through a difficult situation during the decade of the eighties, an enormous expansion with a lack of enough financial support submerge it into a crisis of quality and, what is of most importance, a crisis of confidence on these kind of institutions. In some newspapers from those years, one could read in some job advertisements, phrases like "... graduates from public universities please refrain from applying". This crisis produced serious effects with consequences through the years, up until now.

At the end of the decade of the eighties, an extended public opinion was that private institution managed to offer a better education than public universities. Quality of public higher education was at stake as a result of the fiscal crisis. How was it possible that an enormous university sector, being so poor, could cope with new demands of the economy? The interpretation of the problem was ambiguous: was it only a problem of lack of financial resources? Was it a problem of disparities with labor market? Was it a problem of inequities in distribution of education opportunities? Was it a problem of marketing?

The explanation of the problem of quality in higher education was linked to the effects of an accelerated growth without an adequate financial support. For instance, an evaluation practiced at the end of the eighties decade, by a team from the International Council for Educational Development, led by Philip Coombs, explained that the problem of quality of Mexican higher education was related to the enormous expansion of enrolments and the wide differentiation of institutions and programs on a setting of financial constraints (International Council for Educational Development, 1990); and some years later, in a different evaluation done by the OECD, it was added that the rapid expansion brought about severe inequalities of educational services among regions and social groups, as well as disparities in the distribution of students among professional fields and between the number of graduates and the capacity of absorption of labor markets (OCDE, 1997).

These concerns brought about a new kind of relationship between the central government and the public institutions. After a long period of loose control upon universities, new kinds of arrangements were set up for their conduction and coordination. As in another spheres of public life, instead of diminishing state intervention, the federal government posed a new set of instruments to implement higher education policies. These new set of arrangements have been identified by some authors as "neo interventionism" (Acosta, 2002).

In November 1989, the General Assembly of the National Association of Universities (ANUIES), approved the creation of the National Commission for the Evaluation of Higher Education (CONAEVA) to design and articulate a national process of evaluation and to propose quality criteria and standards to assess the functions and activities, as well as to devise an alternative model to assign financial resources to universities in correspondence to results of evaluation (CONAEVA, 1990).

During the next years, the CONAEVA worked on different areas for evaluation: institutional development, educational programs, faculty activity and students learning. Every one of these lines of evaluation followed different paths and have been analyzed (Navarro, 2013) in relation to their effectiveness as a means to assign extraordinary funds to support institutional development.

Concluding remarks: goals that melt away

At the beginning of the second development of the new century, being the country well advanced in the adoption of the neoliberal model through the so called structural adjustment, with a correspondent wave of reforms, a conflict in Middle East produces a radical drop in Mexican oil prices, with a radical reduction of the currency exchange rate, followed by an important reduction of financial remittances from Mexicans working in United States. A new fiscal crisis is in its way. The government has no longer financial resources to cope neither with growth of pre-university and university level of education, as to reach the goal of 40% in youth participation of higher education opportunities, nor promoting quality of existing higher education provision.

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How the Issue of Unemployment and the Unemployed Is Treated in Adult Education Literature within Polish and U.S. Contexts

Abstract

This paper, based on a qualitative analysis of adult education literature, presents a comparison of approaches to unemployment-related problems in Poland and the US. Unemployment serves here as a lens through which attitudes towards various areas connected with adult education can be viewed. The conclusions drawn from the research can be both the source of reflection for adult educators in different socio-cultural contexts as well as the starting point for further research related to the topics explored in the text.

Keywords: adult education, literature research, unemployment, comparison, Poland, US

Introduction

In this paper, the authors compare approaches to the issue of unemployment and the unemployed in adult education literature in two different socio-political settings: Poland and the US. As in comparative studies in general, this one is aimed, first of all, at better understanding another socio-educational environment in order to better recognize rules and criteria of assessment of one's own country, a fundamental step in looking for new ideas and inspirations (Harris, 1980). The choice of the topic is not coincidental. The authors treat unemployment as model lenses through which one can filter the approaches of adult education theorists to the problems of social exclusion, poverty and either adaptive or transformative character of their area of interest.

Background – situation in Poland

The Polish context is marked by socio-political transformation from the late 80s which was accompanied by the economic crisis that affected average citizens and had its far-reaching consequences: unemployment, social inequalities, poverty, disappearance of state-guaranteed safety, marginalization of many social groups (Kawula, 2004, p. 22; Bogaj, 2010, p. 7; Bogaj, 2007, p. 18). These phenomena were new experiences for Polish citizens as they were either absent in the country life before 1989 or hidden by the communist propaganda. Their size and rapid growth after 1989 were unexpected for most Polish people and the case of unemployment is one of the best examples of the loss of stability for a big part of Polish society: its rate in January 1990 was 0.3% and amounted to 16.1% in 1995 (Główny Urząd Statystyczny, 2015). Within these indicators, some groups were exposed to a higher rate of unemployment, e.g., women, the unemployed under 25 and over the age of 50, people with disabilities (Ministry of Labour and Social Policy, 2015, pp. 80-81), as well as those living in rural areas.

Joining the European Union (EU) in 2004, Poland became a part of European legal system and adjusted the country policy to European recommendations, also in

the field of adult education. The main documents that guided adult educators (Commission of the European Communities, 2000; European Commission, 1995) emphasize a key value of economic growth, competition, and employment. The subordination of education to the economy and prioritizing the latter was criticized by numerous scientists within adult education (Frąckowiak, 2005; Muszyński, 2005; Pierścieniak, 2009) and inevitably influenced the way unemployment-related issues were treated in the examined literature.

U.S. cultural context

Within the time period of the literature review, a Great Recession in the US took place after a housing bubble burst in mid-2007 and the economy went into a recession. Unemployment peaked at 10% in October 2009. As stocks fell and a Wall Street bailout ensued, this period was deemed the most serious financial challenge in the US since WWII.

Dominant cultural themes and values originally compiled by Williams (1970) and then further adapted by Ginsberg and Włodkowski (2009) are helpful in examining the current dominant cultural paradigm in the US and how unemployed adult learners are situated. Dominant cultural beliefs emphasize the rags to riches story, or those who have achieved success have worked hard and deserve this success. Disciplined productive activity and the desire for the “good life” are central within dominant US values (Williams, 1970). Within these values, a nationalism-patriotism exists to that which is called American, including a high appreciation of the economic system.

Methodology

The literature review of adult education in Poland is based on the analysis of the contents of a quarterly *Polish Journal of Continuing Education (Edukacja ustawiczna dorosłych)* and *Andragogy Yearbook (Rocznik Andragogiczny)* published 2004–2013 (90 texts total). The timespan was determined by the year 2004 which was marked by Polish access to the EU and the 15th anniversary of Polish systemic transition from a centrally steered to a free market economy. Using dates corresponding to the Polish search, literature from the three adult education journals associated with the American Association for Adult and Continuing Education were examined: *Adult Education Quarterly*, *Adult Learning*, and the *Journal of Transformative Education* (65 texts total). The texts were qualified to further research by the key words, or, if they lacked them, by the content analysis in which unemployment and unemployed were identified as the main topics of the text. Following the qualitative research procedure, the data was coded, i.e. classified in the categories or frames that emerged during the analysis (Babbie, 2003, pp. 342–353; Rapley, 2010, p. 216; Silverman, 2012, p. 149).

Poland – main findings

Within Polish literature, 90% of the examined texts were related to unemployment seen through policy, institutions, and their programs. First of all, they viewed state employment policy related to combating unemployment, the issue

of job counselling, and vocational training. Thus, the texts were focused on *Act of 20 April 2004 on the Promotion of Employment and Labour Market Institutions* (Gawlik & Kupidura, 2004, p. 48), the ways of improving standards of labour market and job counselling (Śmigiel & Żurek, 2011, p. 46), and vocational training as ways of combating exclusion and adjustment to the labour market (Kuhn, 2010, p. 80; Delgado, 2010).

Many articles were devoted to describing various institutions dealing with unemployment: employment agencies, city and regional councils, community information centers, non-profit organizations, academic carrier offices, and centres of professional in-service training. The same number of texts dealt with description of the E.U. funded programs, including trainings, requalifying courses aimed at combating unemployment or mitigating its effects, and their evaluation (Kupidura & Maleńczak, 2006; Religa, 2010).

Generally, all these texts carry the message of necessary adjustment to the job market and being flexible to survive in the changing and demanding requirements of the economy.

As stated above, unemployment in Poland has some characteristics with particularly disadvantageous situations of some groups, e.g. the unemployed in rural areas. These people, in many cases, lost their jobs with the socio-political transformation of 1989 and now are living in industrially undeveloped areas. With insufficient education, their unemployment has a tendency to be a generational and permanent state. Yet, the reflection on these problems is hardly traceable as it appears in just a few texts (Kicior, 2007; Kupidura, 2007; Kupidura & Bednarczyk, 2008). Another group that is presented only occasionally, although their share in labour market is below the European average, are people with disabilities, the main theme of two texts, focused either on concrete programs aimed at their vocational activation or general analysis of their situation in the labour market (Dycht, 2009; Paczula, 2011). The biggest age group of the unemployed is constituted by people aged 18-25. However, in the analysed material, only four texts were devoted to this group: two highlighted the problem of the unemployment of university graduates in Poland (Tomczyk, 2011; Tomczyk, 2012), one concerned a very high percentage of young people in a region (Sitek, 2013), and the third described a program aimed at their inclusion in the job market (Religa & Ippavitz, 2011). Moreover, although after joining the European Union Poland experienced massive waves of economic migrations, there is only one text devoted to this problem (Flaszyńska, 2005).

U S – main findings

In the U.S. literature, unemployment or to be unemployed as a characteristic of a learner was related to the main area of examination, but was not the primary inquiry.

A critique of neoliberal ideology centering on alleviating the individual from unemployment or educating an individual for employment was a focus of a body of literature (Formosa, 2010; Glastra, Hake & Schedler, 2004). The critique is that lifelong learning has become an apparatus to train for a vocation rather than emancipatory purposes. The contexts for these works are outside the US, e.g. Netherlands.

A main focus of the U.S. literature centered on workforce development in several areas: green jobs and the green economy to retrain semi-skilled workers (Killingsworth & Grosskopf, 2013); urban workforce training programs (Martin & Smith, 2011); and welfare education programs (Alfred, 2007; Sandlin, 2004).

Low literacy skills and lack of basic education were areas cited as contributing to an adult's unemployment (Blunt, 2005; Marschall & Davis, 2012). For example, Blunt (2005) discusses the use of evaluation of adult education and development programs for low-literate adults. Marschall and Davis (2012) address the need for critical reading skills in adult students returning to college and for subsequent employment. In these cases, unemployment is not the primary focus; however, unemployment is a status to be avoided or eliminated.

Social structures and identities also were discussed as systems and positionalities related to unemployment. Worker education and the labor movement history (D'Amico, 2011; Parrish & Taylor, 2007) and globalization and education in revolutionary organizations with the US (Holst, 2004) were topics emphasizing a historical examination of the learner as worker. The role of communities for women (Flemming & Nelson, 2007) also was addressed.

Social identities relating to the intersectionality with unemployment include second language learners (Adamunti-Trache, 2013), refugee status (Morrice, 2013), or immigrant status (Andersson & Osman, 2008) related to those entering a new culture. Other intersectionalities include gender (Sealey-Ruiz, 2007), race and gender (Alfred, 2007; Bridwell, 2013; Sealey-Ruiz, 2007), and age such as nontraditional students returning to college (Bye, Pushkar & Conway, 2007).

Conclusions

A comparison of how unemployment and unemployed are situated within U.S. and Polish adult education contexts can provide areas for further inquiry.

The absence of a critical approach in adult education in Poland normalizes the issue of unemployment and severely limits discussion on the systemic roots of unemployment. The learning adult and institutions of adult education are not seen as creators of transformation, but rather means to teach how to adapt and subordinate to change. Although in the U.S. literature a critique of neoliberalism as well as structural barriers is present, articles lack deep examination of what "work" means with regard to identity. The U.S. literature does not fully examine a bridge between two basic areas: the need of jobs and emancipatory education. However, the very presence of a critical approach in U.S. literature could inspire Polish adult education theorists and policy makers to further interrogate issues of unemployment.

In the Polish context the unemployed are presented mostly as the recipients of different forms of support. In the U.S. literature, to be unemployed is a status to be ameliorated through whatever means, which is rooted deeply within U.S. dominant cultural paradigms. U.S. belief of what success is and how it is achieved from within the dominant paradigm may overlook complex systems or view socio-economic status as that which has been earned.

Marginalization is addressed within U.S. literature to a higher degree than in Poland. However, the primary source of marginalization is first on identities other than being unemployed. The intersectionality of the problem of unemployment is hardly present in Polish literature whereas homeless women of color (Bridwell,

2013) and different impacts of workforce education for men and women (Hawley, Sommers & Melendez, 2005) are addressed within U.S. literature.

To sum, the presented article can be the starting point for the search of an adult education model that is sensitive to the challenges of the contemporary world and employs critical analysis of emerging issues. In this paper, unemployment served as a lens through which the model of adult education can be viewed. The picture that appears after the research of the literature shows that Polish approaches may provide more focused ways for U.S. scholars to situate unemployment and U.S. approaches in this field, still far from the ideal, but growing on socio-cultural diversity and criticism towards the neoliberal agenda, can be the source of inspiration for adult educators who aim to integrate transformative educational activity.

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Contribuciones de un Modelo Multiniveles para el Análisis Comparado de Impactos de Políticas Educativas en la Educación Superior

Abstract

This paper describes the methodological approach that has been developed for a doctoral research applied to the analysis of the impacts of tutoring's policies in Argentina and Mexico. It is considered of great value to contribute with the qualitative study of the impact of education policies in the different institutional contexts. It is a complex and multidimensional approach from a comparative and sociocultural perspective. The epistemological foundations of methodology are developed, and the multilevel model is supported on reviews and re-conceptualizations of the Bray and Thomas' Cube. It includes the description of dimensions, sub-dimensions and axes that comprise the categories of analysis already used. Finally - based on the results of this research - reflections about the contributions of this model are presented for the comparative analysis and its potentiality for a deeper understanding of different levels of analysis that are interrelated and mutually influential.

Keywords: methodologic approach, multi-level model, Comparative Education, education policies, Higher Education

Resumen

En este trabajo se presenta el enfoque metodológico desarrollado en una investigación doctoral, aplicado al análisis de los impactos de las políticas de tutoría en Argentina y México. Se considera fértil para contribuir a la investigación cualitativa de impactos de políticas educativas en distintos contextos institucionales, por su abordaje complejo y multidimensional, desde una perspectiva comparada y sociocultural. Se desarrollan los fundamentos epistemológicos de la metodología, y se caracteriza el modelo de multiniveles, que integra revisiones y reconceptualizaciones del cubo de Bray y Tomas. Se incluye la descripción de dimensiones, subdimensiones y ejes que integran las categorías de análisis utilizadas. Finalmente, a partir de los resultados alcanzados en la investigación de referencia, se plantean reflexiones sobre los aportes de este modelo para el análisis comparado y su potencialidad para una comprensión profunda de distintos niveles de análisis interrelacionados y mutuamente influyentes entre sí.

Palabras clave: enfoque metodológico, modelo multiniveles, Educación Comparada, políticas educativas, Educación Superior

Introducción

El enfoque metodológico que se presenta en este trabajo se aplicó en una investigación doctoral sobre *Impactos de las políticas de tutoría en universidades de Argentina y México* (Capelari, 2014a). Es un estudio cualitativo y comparado de casos de universidades de Argentina y México, y de los ámbitos nacionales en que éstas se insertan, situado en el período 2000-2012. El propósito ha sido analizar

impactos desde una perspectiva comparada y sociocultural en relación a los motivos políticos identificados y a las transformaciones generadas.

Los fundamentos de la comparación cobran sentido si se tienen en cuenta tres cuestiones centrales: a) la emergencia de la tutoría en los nuevos escenarios de la Educación Superior; b) la centralidad de las políticas de tutoría en los países latinoamericanos como estrategias para favorecer el ingreso, la permanencia y la graduación en las universidades; y c) los procesos de institucionalización de la tutoría que se producen en Argentina y México desde el año 2000. En ambos países se identifican problemas educativos similares y demandas de inclusión e igualdad que apelan a la función democratizadora de las universidades y la emergencia de sistemas de tutoría para responder a las mismas (Capelari, 2014b).

Los objetivos que se plantearon para esta investigación fueron:

- Sistematizar perspectivas políticas sobre la tutoría universitaria, formas de implementación e impactos en casos institucionales y ámbitos nacionales.
- Analizar interacciones y articulaciones entre políticas nacionales e institucionales, en su génesis, implementación e impactos.
- Comprender los significados que los distintos actores -alumnos, tutores, autoridades- dan a los problemas y motivos que orientan sus prácticas y a los resultados alcanzados.
- Identificar transformaciones e innovaciones generadas en los sujetos e instituciones, que contribuyen a mejores condiciones para los aprendizajes en la universidad.

Perspectivas sobre las políticas educativas

El análisis de las políticas está influido por la forma en que las mismas se definen y consideran (Yang, 2010). Esta investigación se adhiere al enfoque de Bowe, Ball y Gold (Yang, 2010) que plantean la dependencia de las políticas de los contextos y sus transformaciones. Diferencian entre: a) *el contexto de influencia*, que incluye intenciones, metas, propósitos, objetivos, b) *el contexto de producción* del texto, que refiere a documentos, artículos, normativas, y c) *el contexto de la práctica*, que se define por las acciones. Estas diferencias permiten reconocer las políticas como procesos, y ubicarlas en contextos continuos, interdependientes e influidos recíprocamente (Yang, 2010).

Los contextos señalados, son categorías valiosas para caracterizar las *políticas educativas* en su complejidad, dinámica e historicidad. Ello supone analizar su génesis, trayectorias, interacciones y concreción a través de los programas implementados en distintos contextos nacionales e institucionales.

Además de la forma escrita, las políticas implican acciones y prácticas. Se considera esencial reconstruir el campo práctico en que se inscriben las mismas y atender a la dimensión del significado... “hacer una política es fijar sentidos sobre la educación; introducir problemas y temas en la agenda pública y de gobierno, argumentar, negociar y construir consensos” (Vitar, 2006, p. 37). Las políticas inscriben intencionalidades, regulan percepciones, definen los comportamientos que se consideran legítimos y valorados, construyen sentidos y realidades educativas (Popkewitz, 2002).

La complejidad y multidimensionalidad del tema de investigación se inscribe dentro de un campo amplio e interdisciplinar de conocimientos, en que confluyen: *la Educación Superior Comparada, la historia reciente de las Políticas Educativas y los Enfoques Socioculturales*; que aportan marcos teóricos y metodológicos para su abordaje.

La metodología seleccionada integra dos perspectivas centrales que se relacionan entre sí: *la histórica y los significados*. Esta necesaria interdisciplinaria es señalada por autores desde distintas disciplinas: la Etnografía (Rockwell, 2011), los Enfoques Socioculturales (Julkunen, 2011) y la Educación Comparada (Schriewer, 2011). La mirada sociocultural se considera valiosa por su focalización en los significados y prácticas de los sujetos en actividades sociales organizadas.

En este contexto, se ha optado por un enfoque metodológico cualitativo basado en un estudio de casos, utilizando un modelo de multiniveles. La descripción del mismo se acompaña de la fundamentación epistemológica y de su relación con y objetivos de la investigación.

El enfoque metodológico: fundamentos epistemológicos

En la actualidad, los impactos de las políticas que se desean estudiar a nivel nacional e institucional se producen en un contexto globalizado. Los sistemas educativos pierden su carácter de unidades de análisis independientes entre sí. Se encuentran en un plano distinto, complejo, caracterizado por un conjunto de “conglomerados de entidades histórico-culturales y de estructuras mundiales emergentes, de configuraciones particulares y de procesos globales de interpenetración cultural, o de hibridaciones y de mestizajes culturales” (Schriewer, 2002, p. 32).

En relación a este entramado complejo entre lo global y lo local, Schriewer (2011) plantea que la política comparada contribuye con “hallazgos que indican un entrelazamiento casi dialéctico de integración supranacional y fragmentación intranacional” (p. 74). Esta perspectiva desnaturaliza la existencia de una racionalidad unidireccional y teleológica de la globalización y advierte sobre su naturaleza no lineal, con impactos potenciales que se producen en los diferentes contextos.

Un enfoque fértil para analizar relaciones entre políticas globales, nacionales e institucionales, es el que señala la dimensión política que opera en estas influencias. Para Steiner-Khamsi (2002) tal vez se ha puesto más énfasis en los aspectos comunes que los diferentes, y en el discurso y en la retórica que en la implementación. No se identifica -como cabría esperar- una mayor convergencia, sino por el contrario, una mayor diferenciación nacional motivada por factores sociales y culturales, tales como pautas de estratificación social, regulación administrativa, política pública, entre otras (Schriewer, 2011).

Cobra importancia interrogar por el impacto del flujo de la internacionalización en las políticas educativas nacionales y en las universidades, teniendo en cuenta *los modelos de referencia utilizados*, tanto teórico-conceptuales como experiencias de otros contextos, las mediaciones y reinterpretaciones que operan en ámbitos nacionales y universidades, las diferencias entre discursos y cambios efectivamente

implementados, y los actores y ámbitos involucrados en las definiciones políticas y programáticas.

La Educación Comparada es una disciplina relevante en este contexto, ya que puede facilitar “el entendimiento de los fenómenos a analizar desde un punto de vista relacional, complejo e interdisciplinario” (Mollis, 2010, p. 519).

El enfoque adoptado en esta investigación, se orienta a conocer y difundir responsablemente las experiencias realizadas, incorporando las distintas voces, y valores de respeto y diálogo intercultural. El abordaje de las semejanzas y diferencias no se utiliza para descubrir carencias o dificultades respecto de un modelo o paradigma a seguir (Mollis, 2010), sino que busca la comprensión y explicación contextualizada de las mismas en su complejidad. Se evitan tanto posiciones universalistas que tienden a la semejanza absoluta y a eliminar formas de diferencia, como posturas ultra relativistas, que desconocen lo que es común en los sistemas nacionales y niegan posibilidades y efectos mutuos en las relaciones interinstitucionales e internacionales (Marginson y Mollis, 2001). Para ello, se utilizan estrategias que ponen en primer plano las formas de diferencias identificadas y a la vez, se busca interpretar estas diferencias en el contexto de variaciones más amplias.

El modelo de multiniveles

El modelo metodológico aplicado para la investigación de casos en *distintos niveles de análisis*, se conceptualiza como de *multiniveles*, y ha sido elaborado a partir de aportes y reconceptualizaciones que realizan distintos autores sobre el cubo de Bray y Tomas (Bray, Adamson y Mason, 2010; Manzón, 2010). Se definieron *dos niveles de unidades geográficas o localizaciones* -los países de Argentina y México- y en cada uno de ellos un doble nivel o localización: *el ámbito de las políticas nacionales* y el de *los casos institucionales*. Los casos incluyeron tres universidades de Argentina y tres de México.

Estos niveles se conciben como ámbitos o estructuras anidadas, permeables y mutuamente influidas, cuyas relaciones mutuas es importante comprender (Manzón, 2010).

El tema sustantivo que atraviesa y articula las relaciones entre los niveles mencionados es el de *políticas y programas de tutoría*. Ambos términos -políticas y programas- se conciben como una unidad articulada, en sus relaciones dinámicas y mutuamente constitutivas. También se consideran los casos en que sólo se identifican políticas sin propuestas programáticas o programas sin políticas explícitas.

Este tema estructura los casos institucionales en tres dimensiones de análisis: *la génesis, la implementación y los impactos*; atravesadas a su vez por una doble perspectiva: *histórica y de los significados*.

Las categorías de análisis: dimensiones, subdimensiones y ejes

Las categorías de análisis se plasmaron en una matriz, a modo de organizador analítico, que vincula las dimensiones (génesis, implementación e impactos) con los niveles de análisis (casos institucionales y ámbitos nacionales en los dos países), desde la doble perspectiva histórica y de los significados.

Las dimensiones se especificaron en subdimensiones y ejes, que representan los aspectos específicos y criterios orientativos a tener en cuenta en el análisis.

La dimensión de la génesis

La génesis de las políticas incluye dos subdimensiones:

1ª. *La caracterización*: se considera el contexto de origen de las políticas, su descripción y los modelos de referencia utilizados. *Los ejes* incluyen la descripción de las políticas (por qué, cuándo y cómo surgen), de los contextos (contextos de influencia, de producción del texto y de la práctica) y de los actores y ámbitos involucrados. También se consideran las relaciones con otras políticas universitarias: inclusión, permanencia, currículum, entre otras.

2ª. *Los problemas y los motivos direccionados*. *Los ejes* de esta subdimensión se centran en los significados que se atribuyen a los problemas definidos en la génesis de las políticas, los propósitos que las orientan y los supuestos que direccionan las transformaciones propuestas. Los significados se consideran a nivel personal, interpersonal e institucional, incluyendo a los distintos sujetos involucrados: gestores, tutores y alumnos.

La dimensión de la implementación

Esta dimensión incluye:

1ª. *La puesta en práctica de las políticas*. *Los ejes* contemplan los procesos de puesta en práctica desde el ámbito nacional y las formas de concreción direccionadas en las instituciones. El análisis se sitúa también en los casos institucionales y los procesos de institucionalización desarrollados: normativas, roles y funciones e inserción en la estructura académica.

2ª. *Las modalidades de implementación*. *Los ejes* abarcan las formas de gestión, articulación y financiamiento de las políticas en cada ámbito. En los casos institucionales, se consideran también, las modalidades de intervención de la tutoría y las perspectivas de tutores y alumnos sobre los problemas que abordan y los instrumentos y actividades privilegiadas.

La dimensión del impacto

Esta dimensión abarca:

1ª. *Logro de los propósitos iniciales*.

2ª. *Impactos en las instituciones*. *Los ejes* se focalizan en los resultados y cambios logrados en el tiempo, las dificultades y tensiones que persisten, los rumbos actuales y las transformaciones propuestas. En los casos institucionales se analizan además:

- *Las normas*: efectos en la estructura y dinámica organizacional y en las articulaciones entre actores y ámbitos.
- *Los roles y funciones*.
- *La comunidad*: experiencias y prácticas novedosas y/o distintivas implementadas.

3ª. *Impactos en los sujetos*. En los casos institucionales, se analizan logros, dificultades y transformaciones propuestas, según autoridades, tutores y alumnos.

4ª. *La interinstitucionalidad*. El *eje* incluye procesos de colaboración, interacción, influencias y transformaciones generadas entre contextos.

Conclusiones

El modelo de multiniveles presentado, se considera un aporte enriquecedor para el estudio comparado de impactos de políticas educativas. Las dimensiones de la génesis, implementación e impactos, atravesadas por la doble perspectiva histórica y de los significados, han permitido comprender las trayectorias de las políticas, sus formas de concreción y resultados en el tiempo, desde enfoques teóricos y metodológicos que captan la complejidad del objeto de estudio. Las categorías utilizadas contribuyeron tanto a estructurar comparaciones rigurosas como a brindar marcos de análisis amplios y abarcativos de la diversidad y particularidad de situaciones identificadas.

La focalización en profundidad en los casos individuales permitió abordar, como señala Kent Serna (2009), el carácter complejo y multinivel de las relaciones entre acciones de gobierno y las respuestas y acciones institucionales. La voz de los distintos actores puso en evidencia la riqueza de significados y experiencias construidos históricamente, con distintos orígenes, desarrollos e intencionalidades. Frente a discursos homogéneos, se visibilizan innovaciones y logros, que de otro modo no habrían entrado en el espectro de experiencias y prácticas posibles.

El modelo metodológico ha permitido además, interpretar las razones de las semejanzas y diferencias halladas, sus causas y relaciones entre los distintos contextos estudiados (Manzon, 2010).

Lejos de pensar en significados únicos, el concepto de *hibridación* utilizado por diversos autores (Popkewitz, 2002; Teodoro y Aníbal, 2008; Schriewer, 2011), ha sido fértil para explicar las perspectivas políticas sobre los impactos, en términos de significados y prácticas entrelazados en la interacción entre ámbitos globales, nacionales e institucionales, como patrones fluidos, múltiples e históricamente contingentes (Popkewitz, 2002).

En síntesis, el enfoque metodológico presentado, evidencia potencialidades para el análisis y la sistematización de comparaciones entre contextos, abordando relaciones complejas y en profundidad. Se considera una contribución valiosa para la investigación de impactos de políticas educativas desde un marco político, comparado y sociocultural.

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Amelia Molina García & José Luis Horacio Andrade Lara

Internationalization, Globalization and Relationship Networks as an Epistemological Framework Based on Comparative Studies in Education

Abstract

In this paper we present some thoughts on the epistemological framework of comparative studies in education. We present some concepts on the internationalization, globalization and inter-relation networks, based on Jürgen Schriewer, Immanuel Wallerstein, and Norbert Elias's theoretical concepts. These reflections were built within the framework of the Theory and Comparative Educational Methods seminars taught in the Master's and Doctorate programs of Educational Sciences at the Autonomous University of the State of Hidalgo. It is worth mentioning, that based on such seminars, several research works have been developing, mostly post-graduate thesis.

Keywords: comparative education, global system, relational analysis, globalization

Introduction

Comparative education has evolved based on new theoretical proposals that have been developed between the late Twentieth and early Twenty-First Centuries. Some of the new approaches are based on Tenbruck and Bergersen and their criticism on Durkheim, since the new globalization surge provides a framework for the understanding of the phenomenon from the internationalization angle and for a very different action than that of earlier centuries. While it is known that in comparative education there is no consensus on their perspectives and positions, as there is in social sciences, because of the opposing ways of perceiving others; there is a constant search to continue analyzing the opposing sociocultural differences, to the extent that, today, the world has been taken as a unit of analysis, due to the degree of transnational or relational interdependence.

Based on the previous approaches, this presentation is divided into three parts: a) Internationalization, b) the origins of a comparative science in education, and, c) the Global System as a unit of analysis, where especially social relationships have become meaningful. We end our work with a brief reflection as a way of conclusion.

World system and interrelation networks

Internationalization

In text of *World System and Interrelation Networks: The Internationalization of Education and the Role of Comparative Research* (1996), Schriewer states that in the new context of internationalization there are limitations to a State's sovereignty, since there are new features that have caused this situation. For example: the global financial interconnections that impede us to act independently from the rest of the world, the international monetary crisis, the global ecological interdependence, global migrations and increased communications. This is interpreted as follows:

there are aspects that a state hands over to other states or to the international community.

In Schriewer's terms (1996), there is now an arena of global relationships of interaction and exchange, due to its global interconnection and multidimensional characteristics, which in evolutionary terms is a new phenomenon. It has implications on individuals' everyday experiences in education and training, since educational communication has been globalized. That is mainly perceived at the level of schools, universities (which are large scale organizations), and in their efforts made to enforce control, which are reflected in educational policies and planning.

The existing international interconnection in education is so strong that we speak of a "global pedagogical public". In the 1930s, Friedrich Schneider developed this perspective, by means of various indicators found in the dense activity of the educational field. In this regard, Schriewer proposes that it is the task of comparative education to reach to the level of the supranational, universalism for the "internationalization of awareness of the problems by educators and the formation of the educational theory" (Schriewer, 1996, p. 18). This initially causal trend finally arrived in the mid-1990s, mainly due to the large number of political-educational and academic events, the creation of associations, the presentation of global reports, and the academic production with international direction, which makes us realize the density of the network of international cooperation in education.

In spite of the above, it is important to distinguish that the international networking in education, which is a fact or a phenomenon that takes place in time and history is one thing, the area of international comparative education, a field of intellectual activity with its own methodology is another. Schriewer (1996) underlines this paradox. He mentions that these are two different things, the precise method of analysis for comparative education and the research field as an intellectual field in the international arena of this discipline, where the sociocultural and historical events and processes take place.

Origins of comparative science in education

Thus, with the intention of clarifying how the idea of a comparative science in education came to be, Schriewer (1996) goes back to the historical context of the late eighteenth and early nineteenth centuries, and resumes Durkheim's studies. Durkheim was pivotal to the development of comparative education, since he rescued the idea of comparison as a characteristic activity of human thought, but in the field of comparative study, it is an example of the transference of a methodological approach taken from natural sciences (biological) applied to Human and Social Sciences.

Another precursor of the comparative analysis in education (and of Educational Science) is Marc-Antoine Jullien (1817) who, along with Wilhelm Von Humboldt, identified the theoretical and methodological problems of transference and mediation of a research approach, from biology to social sciences, where they indicated that its scope was extended far beyond the world of anatomy. Humboldt glimpsed into the methodological debate of comparative education, the "tangle" of methodological options that are difficult to reconcile with one another. Because of this, it can be said that from the beginning there is no consensus on what

comparative education entails since it is full of contrasts and controversies. There are two ways to analyze this, due to the opposing perspectives of perceiving one another. That is, first there are studies of causality (with cause and effect relationships) as in nature, and second, those studies which rescued humans' self-reference or historicity. The ways in which the sociocultural differences are seen can be diametrically opposed because, some approaches were very superficial and also their descriptions, while others were meticulously presented.

World system as a unit of analysis

Schriewer (1996) highlights that it was not until the late twentieth century, that the world is taken as a unit of analysis in the sense that the vision of multiple regional societies or separate nations expires. The comparison is replaced by historical reconstructions or global analysis of transnational interdependence. Tenbruck (1981) proposes an analysis of transnational interdependence and cross-cultural diffusion, which, in terms of Elias, refers to the *relatedness*. Then, by the end of the twentieth century and under the concept of the *world as a unit of analysis*, the environments are depending on each other, and the concept of autonomous societies separated nationally and regionally is left behind. "Global System" contrasts and counterpoises with the identity of the town, the nation-state, national culture, individuality, political autonomy, multiplicity of mutually independent societies. And thus the concept of a society constructed from natural science models (in its causal relationship) is questioned.

This idea of a global system as a network of transnational and transcultural interdependence in environments depending on each other, strongly agrees with the construction proposed by Elias in his *Sociology of Knowledge*. According to Guerra (2012), from Elias's perspective, knowledge is something that has been accumulated throughout history and it is very fortunate for everyone that it has been transferred from generation to generation. In that sense, it is not something that depends solely on the isolated subject (*homo clausus*), that sees only cause and effect relationships, but it is a product that has been appearing since the *homines aperti*, and understood as a social product, a product constructed on interdependence networks and/or human social relationships. Within this framework, knowledge is something produced by humankind, which has been developing as a changing social process (human generations). So, that knowledge is *essential relatedness*, resulting from the civilization process.

For Elias, the process of knowledge is an approach made by a group of people who use their own resources to attain a constantly improving knowledge, neither true nor false but "relatively adequate" or "inadequate". It is the relationship between the oldest existing knowledge and the new results, achieving a progressively better adjustment. Elias does not agree with Kant, and mentions that relational knowledge is not innate, as it depends on the experience and wealth of accumulated knowledge and transmitted by previous generations.

This essential relatedness of humans, focused the discussion of *homo clausus* vs. *homines aperti*, because it is acknowledged that knowledge is not an innate construction of an individual but rather that the individual is generated by an intergenerational process, accumulated throughout time, in a spiral rising form. In this regard, the contributions of Elias in the construction of the notions of

internationalization, world and interrelation networks used in the epistemological framework of comparative studies in education, represent a very important step in the theory of knowledge, which considers humankind as subject of knowledge, rather than isolated individuals, groups of individuals structured in imaginary models linked to the civilizing process.

For Elias, there is a mixture of objectivity/subjectivity in the process of knowledge construction, since there is no domain of one over the other. In any case, what is offered in the construction of knowledge is the position of the person or group, characterized by a commitment (subjectivity) or estrangement (objectivity).

The commitment refers to emotions and detachment, a balanced reflection of the object, that it is relative, not absolute. In the process of civilization, linked to the development of knowledge, from Elias' perspective, it has been called *dually-linked*: where the physiological and sociological senses are located, where the greater weight can be in the subjective conditions (commitment-emotionalism) or where appropriate, in the objective conditions (detachment). Therefore when there is a greater development of knowledge and science there will be better reflective objective conditions (modern societies) and when the development of objective conditions decreases, the emotions and the prevalence of subjective conditions (prejudices and fears: animistic societies) will be greater; thus less advancement of science and knowledge in the process of civilization.

The process of civilization presupposes: a greater control of emotions or instinctual self-control, the impulses are limited and "rational" capabilities are being used. This is where "The progress in the world's domain has been given in an intergenerational manner, by the transmission and use of symbols and knowledge" (Guerra, 2012, pp. 54-55). Thus, Elias indicates that in the civilizing process there is an ability to show the relationships or the relatedness of things, in the sense that no generation starts from scratch, but rather that we are all carriers of knowledge development. In this direction and according to Guerra (2012), in order to have a further advancement of social knowledge, scientists must overcome several obstacles, including the following:

- 1) Greater independence of social sciences in relation to the natural ones, especially with respect to their methodologies.

- 2) Humans require to see with more objectivity (distancing) that social life, things and processes, take place in a relational process and not only as a product of his own subjectivity. This involves conducting a "de-anchoring" or "unlearning" process.

- 3) Social scientists must modify their heteronymous behavior or the prevalence of tensions, passions and feelings as human beings. That is, that there is a contradiction between their role as social scientists and their individual position and commitment as members of a group; an essential contradiction to understand the problem that has to be resolved.

For Elias (Guerra, 2012, pp. 57-60), social knowledge is disseminated in *interdependence networks*; it is created in relation to the power structure in the scientific institutions, among dominant groups of more "established" disciplines, linked to the methods of natural sciences, emulated in the field of social sciences and with more strength than other marginalized groups. Both groups seek to improve their positions in the figurative framework in which they are, in a context

where a working social division is extremely uneven, since they tend to differ specially in their ideological traditions and values.

Guerra (2012) mentions that the scientific departments or disciplines behave as if they were sovereign States that quarrel among themselves, within the framework of a working division which is required in the exploration of the world, taking as a basis the expansion of the world of knowledge. He mentions that a discipline has more power when it is more established, since it tends to accentuate its differences in relation to other disciplines, in a competition towards power opportunities between groups.

In short, the concept of *Homines aperti* that Elias handles, gives man the possibility to open up to others (*being-with-others*), but not in the *Heideggerian* sense, *in regards to the essence of the being and his time*, it refers to reaching formulations of interdependence networks of people, relational nature of human beings and in close interdependence between subject and object, referred to as double bond.

These approaches are consistent with the idea of “World System” developed by Schriewer, since he views a global context of relationships of interdependence at a world level against closed national systems, which do not allow us to view the effects of internationalism in education. Hence the need to develop the “World System” as a process of building large-scale networks, transcontinental trade relations.

In building the method for comparison, we must surpass the level where we can only identify gradual similarities or differences that are viewed as basic operations or as (visible) differences in social life. These must be combined with universal ways of thinking, and we must perceive the “cultural otherness”. These interpretations have a social relationship: that is, to compare relationships and not just objects, which would be a simple comparison, unlike comparing generalities of a universal character. Scientific comparison involves not only data but also theories and critical corroboration, so the method involves not only identifying similarities and ordering differences but also *apprehending those differences*.

According to Schriewer (1996), and based on Bergersen’s and Tennbruck’s proposals, the emergence of the global means to see the world system as a collective and emerging reality (still in construction and therefore incomplete), implies a change of paradigm. The old comparison (Durkheim) is replaced by the global analysis of transnational interdependence and re-emerges as a critical entity to consider the relationship of the whole to the parts and of the parts to the whole, as well as considering the global context of the interdependence relationships at a world level, and also to consider that the idea of a *world system* (proposed by Wallerstein) confirms the Dependency Theory of 1950, as an earlier form of this new paradigm, leaving behind the Modernization Theory. We can say, then, that there is a shift from the Dependency Theory (with its idea of the emergence of the division of labor), to the analysis on issues about trading relationships between industrialized developed nations and dependent countries, which is identified as a **world system**, as a *sui generis* emerging reality.

Wallerstein’s idea (1989) revolves around the modern world system, this takes the form of a world economy in a capitalist society, the world economy has been expanding to encompass the entire earth, it has had expansion and contraction

moments and a variable geographical location according to the economic roles of the dominant countries and it has undergone a transformation process that is still ongoing. In this context, analysis of the national education systems can only be fully explained by taking into account their respective positions within a global structure (supranational).

Having in mind the above, Schriewer (2011) recognizes that there are certain trends about the emergence of a world educational system:

- a) A uniform educational expansion (confirming education as an important element of a transnational social system).
- b) A model of scholastic education (common world management structure).
- c) An institutionalized schooling in the expansion and globalization context that entails the processes of modernization of society.
- d) International communication: information transmission and supranational publications.
- e) A wide range of international organizations (UNESCO-OECD-World Bank).
- f) A hierarchical system of science that pretends the universalization of a particular vision of the world (the viewpoint of the International Organizations).

Also, in this trend three stages of development are identified in the construction of this world educational system, where production, distribution and legitimation that are considered scientifically relevant are controlled by the supranational throughout the world.

- 1) National characteristics which are at the same time transnational characteristics.
- 2) Global trends of massive and uniform expansion (as in the case of the universities).
- 3) Academic mobility and academic journeys.

Therefore, in education, comparative research has a component of various interrelation networks which are:

- The relationship between employment policies and labor markets with social and educational policies.
- Increased interconnection between professional or vocational education and training systems, qualified structures of working force and work organization.
- The interconnection between education, modernization and development.

Conclusion

In accordance with the previous statements, we face the need to coexist with some ambivalences in the international processes, which have to be rescued in order to transform the comparative studies in education, (where we identify the reconciliation between history and comparison); tensions between homogenization and differentiation; ambivalence between tradition and modernity; trends of internationalization vs. regionalization, and ambivalence between supranational integration and the strengthening of the Nation State.

Thus, the *relational* aspects developed by Elias, will be useful to show the new perspective of comparative studies in education, particularly for trends in comparative education based on the world system, with a supranational vision.

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Part 2

Pre-service and In-service Teacher Training & Learning and Teaching Styles

Jana Kalin & Barbara Šteh

The Goals and Conditions of Qualitative Collaboration between Elementary Schools and Community – a Challenge for the Professional Development

Abstract

One of the most important tasks that schools have is the establishment of collaboration between the school and the wider community it belongs to. We have conducted an empirical study on the collaboration of Slovenian elementary schools with different partners. We were interested in, among other things, what are the objectives set by schools in the field of collaboration with the community, and what the schools point out as examples of good collaboration. Descriptions of good collaboration that the principals presented have been analyzed from the perspective of basic characteristics of the collaboration between partners. The questions about the conditions of the partnerships and new challenges that everyone involved have to face naturally also arise.

Keywords: elementary schools, community, collaboration, partnership

Introduction

It is important to realize that school is part of the local as well as wider social environments (Bečaj, 2009; Deutsch & Kolar, 2009). It is, therefore, important for schools and school community members, and individuals and institutions to work together intentionally, to establish mutual trust and encourage a culture of dialogue through various shared activities in schools and in the community. This opens up a space for learning from each other, it offers possibilities of educating both children and adults and develops individuals' social and cultural capital, which strengthens the sense of belonging and solidarity, and enables individual and community development.

Contemporary authors (e.g. Epstein, 1995; Sheridan, Napolitano & Swearer, 2002) discuss the involvement of schools, individuals and institutions in the community in terms of partnership, which they define as a collaboration of various individuals as equal partners, forming a trustworthy relationship within which they share ideas, resources, services, expertise, and responsibilities on the path to common goals. Partnerships combine individuals and material, financial, etc. resources both in schools and the community, which empowers schools, families as well as wider communities and their members.

Nelson, Amio, Prilleltensky and Nickels (2000 in Sheridan et al, 2002, p. 322) emphasize that through good-quality partnerships or positive relationships individuals create more than a concrete program of collaboration: “/.../ they build a sense of community, a positive social climate, and an ethos of change”.

Sheridan et al. (2002, pp. 322-323) define a number of *basic characteristics of the partnership* between schools and communities. An essential characteristic requires that interactions among participants should be founded on collaboration. Collaboration means more than simply working together; it means a change (transformation) in the views and structures about *how* individuals or institutions collaborate (Minke, 2000 in Sheridan et al, 2002). Collaboration means blurring the borders among individuals or institutions and distributing resources and responsibilities for planning, conducting and evaluating activities and goals among all participating partners. Here, it is important to highlight that there should be mutual respect for the professional autonomy of each institution and individual. Furco (2010) notes on the popularity of academic service-learning, which is characterized by students’ participation in various activities in the community where they develop and carry out solutions for real-life, social problems in the local community or in the wider society. Simultaneously, students acquire theoretical knowledge and learn how the concepts they learn about in the classroom can be applied in the situations of their everyday life. These projects are most frequently conducted in collaboration with community members, and they are primarily designed with the needs of the community in mind. With this type of learning, teachers should be prepared to give up some control so that they can empower students to take on an active role in the learning process (ibid., p. 234). Teachers also need time to develop relationships with community representatives “who will be important partners in the service-learning enterprise” (ibid.).

Collaboration between schools and communities is based on shared responsibility (Sheridan et al, 2002). All subjects participating in partnership simultaneously and individually co-create life in a particular community, they enable learning for all participants and they encourage their development.

During such collaboration, very different individuals with different knowledge, skills, experiences, viewpoints and perspectives meet (ibid.). Such a variety among participants should be perceived as a specific advantage rather than a disadvantage. A variety of viewpoints requires negotiations and agreements and presupposes respect for difference. Any prejudices and discriminatory behavior have a negative effect on the quality of collaboration.

Having positive personal relationships is of paramount importance to partnerships among schools, individuals and institutions in the community (ibid.). Balanced relationships based on cooperation and co-dependence must be established. These relationships are developed in the context that puts students in the foreground of all considerations. Partners focus on students’ benefits from the aspect of their learning and development.

The characteristics of partnerships and their activities relating schools and communities or individual institutions are flexibility and proactive orientation (ibid.). Collaboration and shared activities depend on the context and the situation in which they are conducted. Collaboration also depends on a number of other factors:

the quality of the relationship, the purposes of collaboration, the availability of resources, the suitability of circumstances for collaboration and many more.

Finally, collaboration is based on common, clearly defined goals whose attainment must be regularly monitored (ibid.). It is important that collaboration should be goal-oriented, which requires a special emphasis during the process of collaboration planning. When stressing achievements, we must not overlook the very processes that any collaboration encourages or the possibilities that arise for future collaboration.

The purpose of the research study

Our empirical research study was designed to gain an insight into how elementary schools in Slovenia are involved in wider communities. We were interested in how schools perceive their role in the environment and the main purpose of collaborating with communities. Furthermore, we investigated how frequently and in what manners they collaborate with individuals or different institutions from the community, what the advantages of such collaboration are, what obstacles they face, and what they see as still unexploited possibilities of collaboration. Of the many research questions, this article deals with only the following:

1. What goals are they going to try to achieve in the area of collaboration with the community in the future?
2. What typifies the collaboration between their school and the community in the described cases of collaboration that they emphasize as an instance of good practice?

Method

In the empirical research we used a descriptive and causal non-experimental method (Sagadin, 1993). We attempted to include all elementary schools in Slovenia in our research study, and in October 2014 we sent out questionnaires addressed to the principals of all of them ($N = 450$). A good half (54%) of all the questionnaires ($n = 245$) were returned. The non-random sample thus included 85 (34.7%) urban and 160 (65.3%) non-urban schools. The questionnaire included multiple-choice items, scales and open-ended questions. Here we only discuss the principals' responses to the questions presented in the purpose of the research. The gathered data were processed and presented at the level of descriptive and inference statistics.

Results and discussion

The goals that schools wish to achieve in the next three years in the area of collaboration with individuals and institutions in the community

The first issue was to find out what short-term goals schools wish to reach in the area of collaboration with individuals and institutions in the community. Based on the principals' responses to the open-ended questions, we formulated nine categories, which present the content of collaboration more than actual goals; at the same time this points to the individuals and institutions they are going to contact when reaching the goals. However, we are fully aware that within individual

categories the goals are formulated at markedly different levels of conciseness and quality – from merely mentioning the content area of their future work to very concisely formulated operational goals which we believe can contribute significantly to activating strengths for their attainment and can provide us with criteria for the evaluation of achievements. Response categories are given by representation, with the exception of the “other” category, which includes general or unclear answers (n = 194):

1. *enrichment of instruction and extracurricular activities* (41 or 21.1% of all answers): participation of individuals and societies from the community in school instruction or extracurricular activities;
2. *co-creating life in and establishing connections with the community* (40 or 20.6%): “*We’d like to make local sights known to the general public.*”;
3. *career orientation* (24 or 12.4%): keeping students well-informed about different professions in the environment, enabling their familiarization with professions and working organizations;
4. *international cooperation* (20 or 10.3%): participation in international exchanges and projects, collaboration with Slovenian schools in the neighboring countries;
5. *intergenerational cooperation* (16 or 8.2%): “*More intergenerational cooperation*”;
6. *school’s recognition, promotion in the public* (14 or 7.2%): “*To make our school’s work better known to the public.*”; “*To strengthen the school’s identity.*”;
7. *collaboration with volunteer organizations, developing humanitarianism and other values in young people* (14 or 7.2%): this category includes both the replies that explicitly name only volunteering and developing humanitarian orientation in students and the replies that refer to wider educational goals that schools strive for (“*To develop the culture of peace and non-violence.*”);
8. *financial reasons for collaboration* (4 or 2.1%): “*Raising as much money as possible to provide for students coming from socially underprivileged families.*”;
9. *other* (21 or 10.8%): the category includes general answers (e.g. exchange of experiences, learning from examples of good practice, more collaboration in life-long learning) and the answers that stress the already existing good collaboration or the wish to strengthen the existing collaboration, but with no explicit or specific goals.

Our results show that the principals’ priorities when considering collaboration with individuals and institutions in the community in the next three years were in the area of the enrichment of instruction and extracurricular activities (21.1%) and in the area of co-creating life in and establishing connections with the community (20.6%). In terms of content, the former goal relates more to developing a good-quality educational process in schools, and the latter refers to collaboration with the environment. With regard to the similar shares of the two responses, it could be argued that the responding schools are equally aware of the importance of collaboration that directly benefits schools (i.e. enriching the curriculum) and the importance of schools’, students’ and educators’ work for the welfare of the local community. Schools are clearly aware of the importance of co-creating the cultural

and social environment in which they function; the role of schools in developing the area's cultural capital is significant. It means establishing a relationship of mutual enrichment.

A good tenth of the responses refer to setting goals in the area of career orientation (12.4%), and a further tenth to the area of international cooperation. 8.2% of the principals cited goals from the area of intergenerational cooperation and learning between different generations. A similar share (7.2%) also mentioned goals from the areas of the school's public promotion as well as volunteer organizations and developing humanitarian and other values in the young.

The smallest share is represented by the goals that the responding principals listed in the area of raising financial means for the school's good-quality work or for the welfare of individual students. These responses were few (2.1%), but we must be aware that such goals are also important to schools' good-quality work, as they affect directly the opportunities that schools can provide in the local environment.

Examples of good collaboration between schools and individuals/institutions from the community

We looked at what kind of collaboration the principals themselves set as examples of good practice they had developed or realized and would wish to share with others. To find out, we asked them an open-ended question with additional questions: who participates in their chosen example of good practice, how and when is it conducted, what are the advantages of the collaboration and what could be improved? Despite a whole page of the questionnaire devoted to their response, the principals repeatedly provided cursory and inexact descriptions of examples of collaboration between schools and individuals or institutions from the community. In spite of certain gaps in the responses, the questionnaire gave us at least some information on examples of good collaboration between schools and the community from a great majority (83.7%) of the schools participating in the research study. This gave us a good insight into a relatively great number of different cases of collaboration between schools and the community. The principals' responses were carefully analyzed and categorized according to the following criteria: the participants in the collaboration, the frequency of the collaboration, the type of collaboration, the advantages of the collaboration and required improvements. During the analysis, however, we were constantly faced with the dilemma about the quality of the described collaboration between schools and the community, and this is the issue we would like to address below. We examined in how many cases the partnership (Epstein, 1996; Hornby, 2000; Sheridan et al, 2002) means that participants prepare and conduct a project together, using the process to learn together as well as from one another and to grow personally. At the other end of this continuum are forms of collaboration arising when schools or communities organize something for one another, but there is rarely any real partnership in collaboration. To distinguish between the different forms of collaboration, we divided all the descriptions of good collaboration into two categories, according to the *level of collaboration*:

1. *Prepare something for others* (150 descriptions or 77.7%): "They ask the school to prepare cultural programs for various events."; "Students' visits in the retirement home, workshops and performances.";

2. *Establish partnership in collaboration* (43 descriptions or 22.3%): for a description of good practice to be included into this category, there had to be a clear description of at least one characteristic of partnership (e.g. common goals, interdependence, learning from one another, participants' empowerment, participation and responsibility of all participants, mutual understanding, trust and respect, equality, goal orientation, etc.) or there had to be a clear emphasis placed on a joint organization or carrying out of something (it was not enough only to state that they collaborate): "*Carrying out a specific task – a goal that is useful in everyday life and the local community ...*"; "*learning from one another ...*"; "*planning the content, organization and realization of an event together*".

Of all the 193 descriptions of good collaboration between schools and the community only rare examples (22.3% of the descriptions) made it possible for us to consider them partnerships – provided they stressed at least one of the basic characteristics. According to our results, it is obvious that schools still face considerable challenges as well as problems when establishing partnerships with the community. Yet we must underline that some schools are successful, and they succeed in a variety of different ways. To illustrate it, let us provide an analysis of a selection of two examples of partnerships between schools and local communities as given by the responding principals. We intentionally chose two very different examples to illustrate that the collaboration with the community can be carried out in a great variety of ways.

1st example:

In one of the urban schools they offer really good intergenerational collaboration, which goes beyond mere students' performances for retired people; rather, *together* with grandparents students set up a maypole, students teach the retired computer skills, and the retired teach students handcrafts (extracurricular handcrafts classes). Grandparents are, additionally, invited to attend physical education classes, and the school organizes a day of movement and intergenerational socializing – charity bicycling for all generations. This, then, is *continuous collaboration*, not only a one-shot event, conducted in a variety of ways. In the above-mentioned example they *build on mutual collaboration and respect* (according to Sheridan et al, 2002), they include *learning from one another (empowerment of both)*, and at the same time they look after cultural heritage, which they see as among the advantages of such collaboration.

2nd example:

This example differs from the others as to the exceptional commitment and *participation of various stakeholders and its integration into the community*. It is an interdisciplinary project on the lighthouse and youth tourism. Participating are all the students and teachers of the school, students and their supervisors from Turkey, Romania and Montenegro (making it an international collaboration), the students' parents, numerous institutions and local community representatives – the municipality, hotels, individual societies, the museum, local restaurants, local cultural workers and students from the Faculty of Tourism Studies. The main activities are

organized during the “Interweek – Meet you at the lighthouse” *at different locations* (the museum, the hotel, the lighthouse, etc.), not only in the school, which shows the integration of the project into the community. The project is expressly *goal oriented*, which is also one of the characteristics of partnership (according to Sheridan et al. 2002), since they design leaflets for young travelers, a video and an exhibition for all locals and tourists in the Lighthouse. In the principal’s own description of the advantages of the collaboration we can recognize the characteristics of partnership: *“increased awareness of the necessity for the synergy among the local stakeholders that can have an impact on the preservation, development and promotion of the community; familiarity with the professions which are unavoidable in the development of tourism and the conservation of cultural heritage; researching the past, the role and significance of the Lighthouse for the community; designing promotion materials; organizing a cultural event related to the lighthouse and tourism; presenting the results to the representatives of the municipality, local tourism providers and cultural institutions”*.

Based on the analyzed examples, we can conclude that schools have a variety of ways to collaborate with the community in a good-quality way, as it is always necessary to adapt the collaboration to each unique context and situation as well as to the needs of community members. Perhaps it is crucial that schools become aware of the importance of such collaboration and the advantages that it can have for both schools and communities. Only then will they be willing to invest energy and effort in collaboration.

Conclusion

It is necessary to ensure, in addition to the fact that the attitudes of all subjects involved towards the collaboration between the school and the community have to be correspondent, some basic conditions for quality collaboration. Sanders (2003) lists the following:

- *professional preparation of the partnership and the competence of the partners involved*; requires quality planning of the collaboration (clarity of objectives, tasks and roles of individuals, and the extent and the time span of the partnership), effective leadership, consideration of the characteristics of all the partners involved and their respective potential; adequate communicational, collaborative and organizational skills of the partners;
- *the selection of a suitable partner*, that is based on the good understanding of all the partners involved, joined research into the possibilities of collaboration, and shaping of the vision of the collaboration; it is crucial to be aware of the specificity of the contribution of each partner, and to develop a culture of willingness to collaborate on the basis of flexibility, respect for diversity and ethnic stance;
- *evaluation of the partnership* involves both, the evaluation of the quality of interaction between partners and the introduction of the planned activities; partnership is always a process and it therefore demands an appropriate

amount of time for formative and summative evaluation that lead employees in their development of their professional skills, and in qualitative collaboration.

Collaboration of schools or teachers with partners on different levels presents a special opportunity for professional development of teachers. The intensity of the collaboration opens new perspectives and enriches individual teachers as well as the school as a whole and on the other hand presents an opportunity for teachers and the development of all participating partners from the community. Consequently collaboration is becoming a lever for integration of different individuals into the process in an effort to enrich the educational environment and the local community and create a culture of collaboration.

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South African Heads of Department on Their Role in Teacher Development: Unexpected Patterns in an Unequal System

Abstract

The Integrated Strategic Planning Framework for Teacher Education and Development in South Africa, 2011-2015 (ISPFTEd) aims to achieve dramatic improvement in the quality of learning and teaching in schools which have diverse socio-economic contexts. Together with calls that a rigorous assessment of the competencies required for the position of Head of Department (HOD) should be introduced, this study attempts to provide understanding of how HODs develop teachers within the context of their schools and subject departments. Responses of HODs are presented and discussed by referring to the organizational structure of subject departments, their understanding of professional development, training to do professional development, professional development strategies used by HODs, support they receive to do professional development, the extent to which HODs are pro-active in professional development and the factors inhibiting them to do professional development. Unexpected patterns are uncovered which challenges the assumption that professional development of teachers is more likely to occur in well-resourced schools than in under-resourced schools. On the one hand it brings a message of hope, but on the other hand a message of concern.

Keywords: professional development, distributed leadership, heads of departments, subject departments, school leadership

Introduction

One of the challenges identified during the Teacher Summit of 2009 and the resultant Integrated Strategic Planning Framework for Teacher Education and Development in South Africa, 2011-2015 (ISPFTEd) is the failure of the system to achieve dramatic improvement in the quality of learning and teaching in schools (DBE, 2012). The National Policy Framework for Teacher Education and Development in South Africa acknowledges that strong leadership and good management in schools are needed and that professional development activities must relate directly to the classroom responsibilities of teachers (RSA, 2007).

Heads of Department (HODs) and Subject Departments

Brown, Rutherford and Boyle (2000, p. 243) argue that the subject department must be the key focus for change in a school in that HODs, with responsibility for a manageable group of people, can enable successful change within the group and thus contribute to whole school improvement. They also feel that HODs and members of their departments share subject loyalty and expertise as well as “*micro-political*” interests, and therefore form units which can be crucial agents of change in schools. HODs may perform an important mentoring and supervisory leadership function in order to facilitate the professional development of their colleagues (De

Lima, 2008, p. 160). This point of view is acknowledged by the National Education Evaluation and Development Unit (NEEDU) in their 2012 National Report when they declare that HODs are the only teachers that are in a position to offer sustained and frequent assistance to effect changes in classroom practice (NEEDU, 2013, p. 81). This focuses on the role of the HOD as being developmental in nature in that the intention is to improve teaching, learning and achievement in the department. This requires HODs to be up to date with recent curriculum developments and to be more than competent teachers if they wish to have credibility among their colleagues.

Turner (2003a, p. 42) used four themes to illustrate the distinctiveness of subject departments and how they could have an impact on how HODs function. Firstly, he refers to Busher and Harris (2000) who distinguish between different categories of departments and highlight the wide range of subject related contexts in which HODs work (Turner, 2003a, p. 42; Turner, 2003b, p. 215). Distinctions are made between: ‘*federal*’ (e.g. science and humanities, where broadly similar subjects may be grouped together); ‘*confederate*’ (e.g. services, which contain a loosely knit heterogeneous group of subjects) or ‘*unitary*’ (e.g. English and Mathematics which are single subject fields). Gunter (2001, p. 108) explains that HODs of single-subject departments have a “*shared disciplinary identity and expertise*” with colleagues in the department, whilst a HOD of a multi-subject department is disconnected from this knowledge base. Secondly, the nature of the subject(s) themselves can influence the ways in which the HOD performs his or her role. A third theme is that HODs are usually recruited on the basis of being specialists for the reason that they are well qualified and experienced in their subject. Lastly, the notion of “*subject paradigm*” can be used to understand how HODs view the subjects they teach (Turner, 2003a, pp. 43-45). An example would be how teachers teaching natural sciences view their role, as compared to teachers teaching social sciences.

In South Africa the allocation of promotion posts to public schools (deputy-principals and HODs) do not necessarily correspond with the curriculum offered by the school and is based on enrolment numbers. The higher the learner enrolment, the more teachers and by implication, more HODs are allocated to a school. Principals are then expected to allocate HODs to subject departments according to the needs of the school and the availability of expertise. In ordinary secondary schools, the twelfth (12th) and twenty-fifth (25th) teaching posts are allocated to Deputy Principals, whilst the fourth (4th), sixth (6th), thirteenth (13th), twenty-first (21st), twenty-eighth (28th), thirty-second (32nd), thirty-sixth (36th), fortieth (40th) and forty-fifth (45th) teaching posts are allocated to HODs (GDE, 2013).

The Personnel Administrative Measures (PAM) as determined in terms of section 4 of the Employment of Educators Act (RSA, 1998) prescribes three years as the minimum experience required for appointment to promotion posts.

Research question

The main purpose of the study was to gain insight into the role of heads of department in the professional development of educators within their situational context. The research question was: “How do heads of department in four secondary schools in the Gauteng province professionally develop the teachers in their departments?” However, this paper does not report on the findings related to the

main research question, but on unexpected patterns which were uncovered, challenging the assumption that teacher professional development is more likely to occur in well-resourced schools than in under-resourced schools.

Theoretical framework of the study

This study was undertaken from a distributed leadership perspective and for the purpose of this study distributed leadership was defined as the purposeful distribution of leadership functions relating to the professional development of teachers by heads of department (HODs) as a group of people with formal leadership roles. This conceptualization is in line with previous research conducted (Hulpia & Devos, 2010, p. 4) and is acknowledged in *The National Report 2012: The State of Literacy, Teaching and Learning in the Foundation Phase* which was published in 2013. This report specifically refer to the establishment of a division of labor in which teacher professional development must be formally distributed to senior members of staff, including HODs (NEEDU, 2013, p. 72). This is supported by Grant, Gardner, Kajee, Moodley and Somaroo (2010, p. 401) who argue that distributed leadership is “*implicit in official documentation in the South African Education system post 1994, which emphasizes a move towards a more shared and participatory approach to the practice of leadership and management in schools*”.

Research design and methodology

In the descriptive qualitative study on which this paper reports, content analysis was applied after interviews were conducted with eight HODs from four different schools. The underlying proposition of this study was that, due to differences in school and subject department contexts, differences may occur in the way HODs professionally develop teachers in their departments.

Taylor (2008, p. 4) argues that there are massive disparities in performance between schools within the South African system. The Southern and East African Consortium for Monitoring Educational Quality (SACMEQ) was created with the aim to facilitate the expansion of quality education in Sub-Saharan Africa by providing the necessary data to monitor educational quality (Spaull, 2011, p. 3). SACMEQ III was a survey conducted in 2007 in South Africa on primary school learner performance. The data indicated definite inequalities in educational performance. Fee-paying schools, forming the wealthiest quintile of schools (quintile 5), far outperforms the lower quintiles “*to the extent that one might think that this graph was depicting two educational systems and not one*” (Spaull, 2011, p. 18). Therefore, maximal variation sampling required that both fee-paying (Schools A and B) and non-fee-paying (Schools C and D) schools be sampled.

In addition, HODs were selected in order to represent single subject (unitary) departments and multi-subject (federal or confederate) departments.

Presentation of data

Distributed leadership is particularly discernible in the subject departments of School A and School D, School A been a fee-paying school and School D being a non-fee-paying school. It is noteworthy that in both these schools, the HODs

reported considerable support by the senior management of their schools who create conditions in which professional development can take place. Distributed leadership is least evident in School B and School C. Significantly, the HODs of these two schools also reported a low level of support by senior management.

Generally HODs indicated that professional development should result in the acquisition of new skills, concepts, appropriate knowledge and processes related to the act of teaching. Aspects such as pastoral care, giving direction to staff and the building of commitment and confidence relate to the descriptors as contained in Performance Standard 9 of the Development Appraisal Instrument used in the Integrated Quality Management System (IQMS). The IQMS is an integrated system consisting of three programs (Development Appraisal, Performance Measurement and Whole School Evaluation) aimed at enhancing and monitoring performance of the education system (ELRC, 2003, p. 1).

Variations occur in the understanding of professional development among the participants which can be attributed to the situational contexts in which HODs are operating. An example would be HOD 3 (School B), who views emotional support as an aspect of professional development. This could be ascribed to her perceived lack of support from the senior management of the school. A second example is HOD 5 (School C), who views motivation as an important aspect of professional development. He experiences difficulties in implementing professional development in his department because:

... if you try to help them, they will look at you as if you are inspecting or following them and you want to find fault.

A third example is HOD 8 (School D), who is required to spend much effort on familiarizing members of her department about Life Orientation and introducing the subject to them.

HOD 6 (School C) views professional development as developing aspects related to the teaching of their subject. She sees herself as the leader in the department and describes her role as follows:

I have to show them the little light they are looking for. I need to make sure that at all times they feel at ease so that they can perform to their utmost.

She also refers to the role she plays regarding inexperienced and novice educators by stating the following:

... teachers these days are being micro-waved ... we are expected to oven-bake them.

Generally the participants indicated that they were not trained to do professional development in their departments and that they relied on their own experience and what they have learnt from HODs under whom they have worked as Post Level 1 teachers. This is a concern as Performance Standard 9 of the Development Appraisal Instrument has as specific expectation that HODs perform staff development functions. This indicates that the potential value of the IQMS as a developmental tool has not been fully recognized or accepted. The exception is in School D where the participants mentioned the acting principal who provided substantial training on how to utilize the IQMS as a tool to conduct professional development in their departments.

Departmental and subject meetings are the most common developmental tool and all the participants mentioned that they use these meetings to conduct

professional development to some extent. Generally, these meetings are held on a regular basis. The participants use these meetings to do micro-planning with the teachers in their departments and to exercise control. HOD 1 and HOD 2 (School A) specifically mention that they utilize check-list forms to assist them in this regard. Teachers in their departments who have attended in-service courses and workshops are also required to give feedback at these meetings. It is therefore evident that these participants perceive routine management functions as valuable opportunities to conduct professional development and their departments could be described as communities of practice.

The IQMS as a development strategy is only mentioned by participants from Schools A and D and it is evident that it is viewed as the primary developmental strategy in their schools. Here class visits are regarded as being a very valuable strategy. The participants of School B (HOD 3 and HOD 4) do not utilize class visits at all and it can thus be assumed that the IQMS is not used at all as a developmental strategy. This is underlined when HOD 4 says:

A person does not really know where to start and how to go about it ... there is nobody that actually gives you background ...

Significantly, the two schools which use the IQMS as a developmental strategy (School A and School D), are also the two schools in which distributed leadership characteristics in subject departments, are the most apparent. The use of Development Appraisal Instrument and Personal Growth Plans (PGP's) as development tools is significantly absent in School B and School C.

Strategies aimed at inexperienced and beginner teachers receive a fair amount of attention. These include attempts at mentoring, coaching and an induction or orientation program. This aspect is most prevalent in School A and School D, whilst the participants from School B and School C pay attention to this aspect to a lesser extent. It is again significant that the two schools that feature the strongest in terms of distributed leadership also have the most structured programs to develop the inexperienced and beginner teachers.

The participants from School A and School D describe the support they receive from the senior management of their schools as very supportive. The opposite sentiment is, however, expressed by the participants from School B and School C, who describe the support they receive from the senior management as minimal. It is once again significant that the participants of the two schools in which distributed leadership is most evident, perceive themselves as being strongly supported by senior management. On the other hand, the participants of the two schools in which distributed leadership is least evident, participants feel they are not supported in professional development. This is worthy of mention in the context of the expectation as expressed in Performance Standard 9 of the Development Appraisal Instrument which specifically requires principals, deputy-principals and HODs to, apart from implementing training and mentoring programs, provide pastoral care and leadership.

Pro-activeness with regard to professional development is most obvious among the participants of School A. HOD 1 refers to inexperienced teachers being teamed up with more experienced colleagues and class visits are planned in such a manner that inexperienced teachers are visited first. HOD 2 mentions that he has a development plan for each teacher in his department and that they aim at preparing

the inexperienced teachers to teach Grade 12 classes. School C is the least pro-active and it is noticeable that very little opportunity is given to teachers to develop leadership and management skills.

A distinction can be made between School A and School D on the one hand and School B and School C on the other hand, with regard to the factors inhibiting professional development. The participants from School A both see the lack of time as the primary constraint on professional development in their department. This is linked to their heavy involvement in extra-mural activities offered by their school. Although not specifically mentioning the availability of time as an inhibiting factor, the rest of the participants alluded to it when asked how many periods they teach per day.

In contrast to School A and School D, the participants from School B and School C refer to a lack of know-how, inadequately qualified teachers and a lack of motivation as the factors inhibiting professional development in their schools. This is particularly perturbing as these HODs are all very experienced teachers. It is striking that in these two schools distributed leadership is the least prominent, whilst being quite discernible in School A and School D.

Conclusion

An unexpected pattern emerged which challenges the assumption that professional development of teachers is less likely to take place in non-fee-paying schools which are under-resourced. The data clearly show that in School D, being a non-fee-paying school with limited resources, have well-structured teacher development strategies in place. Although having limited physical resources, there is a clear commitment to professionally develop staff. The opposite could be said of School B, which is a well-resourced fee-paying school. Here low levels of motivation and a lack of commitment to professional development were uncovered. One could therefore conclude that being a well-resourced school does not necessarily equate to well-structured in-school professional development. In addition, one cannot assume that poorly resourced schools are unable to implement well-structured and effective in-school professional development programs.

This point to the impact of leadership in organizational improvement and underscores the notion that quality leadership is associated with organizational improvement. In the South African situation there is furthermore a definite expectation that leadership must be distributed to HODs as indicated in Performance Standard 9 of the Development Appraisal Instrument as agreed on in Resolution 8 of 2003 of the Education Labor Relations Council (ELRC, 2003, p. 43). Distributed leadership has a "*leader plus*" aspect, which recognizes that leading and managing schools can involve multiple individuals, and a "*practice*" aspect, which implies that the practice of leadership is shared and realized within extended groupings and networks of which some would be formal and others informal (Spillane, 2009, p. 70). This could be manifested through the work of subject departments.

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Marlena Plavšić & Marina Diković

Do Teachers, Students and Parents Agree about the Top Five Good Teacher's Characteristics?

Abstract

As the most influential figure in the classroom, a good teacher has long been the object of research. His/her most important characteristics can be analysed from more than one point of view. The objective of this study was to apply Korthagen's model of levels of change in exploring the most important characteristics of a good teacher from the perspective of students, teachers and parents, and possible differences depending on elementary and high school and teachers' experience. There were 384 participants: 158 students, 78 teachers, and 148 parents. The most desirable characteristics from all three perspectives were fairness, patience and teaching skills. Some differences were found between elementary and high school students and teachers. The listed characteristics fit Korthagen's model mostly in the levels of mission and competencies.

Keywords: good teacher, characteristics, students, teachers, parents

Introduction

There were never doubts about teachers' significant role in students' acquisition of various skills, knowledge, attitudes, motivation, beliefs, even life choices, etc. Teacher is the single most effective factor that determines the quality of education (Cooper, 2013, p. 2). For more than a century scholars have studied characteristics of good teachers (Stronge, Ward & Grant, 2011; Raufelder et al, 2016). Bakx and colleagues (2015) point out that demands on quality of education and particularly on teachers have incremented, but defining a good teacher has not reached a consensus.

Research of the most important characteristics of a good teacher from students' perspective often find descriptions of teacher's personality (e.g. friendly, caring, etc.), teaching skills (e.g. appropriate didactic methods, guidance, etc.), good relationship and authority (e.g. Alkan, 2013; Bakx et al, 2015; Raufelder et al, 2016). Minor differences can be found among younger and older students: younger students prefer teachers focused on transfer of knowledge and skills, while secondary prefer communication and relational aspect (Beishuizen et al, 2001; Bakx et al, 2015). Studies from the teachers' perspectives sometimes reflect dichotomy on personality and ability characteristics of a good teacher (e.g. Beishuizen et al, 2001), or they categorise numerous characteristics that teachers list (e.g. Murphy, Delli & Edwards, 2004; Stronge, Ward & Grant, 2011). Although it would be expected that exploring the parental attitudes about good teachers' characteristics would be abundant, as they are important agents in their children's education, it is rarely found in the literature (Rubie-Davies et al, 2010). Tatar and Horenczyk (2000) thoroughly analysed parental expectations from teachers and divided them in three categories: help, as most expected, competencies, and lastly fairness.

However, it is rare that research of the most important characteristics of a good teacher take perspectives from students, teachers and parents simultaneously. Korthagen (2004) offered the *model of levels of change* which may be a helpful

framework for such analysis. There are six levels in the model: environment, behaviour, competencies, beliefs, (professional) identity and mission. The outermost is *environment*, which refers to the class, students or school. *Behaviour* includes teacher's actual performance. *Competencies* comprise knowledge, skills and attitudes, as a potential for behaviour. Depending on the situation, competencies are expressed in behaviour. The next are *beliefs* teachers have regarding to learning and teaching. *Identity* refers to how teachers see their role as teachers and what kind of teachers they want to be. The last level, *mission*, is about becoming aware of the meaning of one's own existence within a larger life context. Korthagen emphasizes that a good teacher will not always show good teaching.

The objective of the present research was to apply Korthagen's model of levels of change in exploring: 1) the most important characteristics of a good teacher from the perspective of students, teachers and parents; and 2) possible differences in these characteristics depending on elementary and high school and teachers' experience.

Method

Participants

Totally 384 persons took part, comprising three groups.

Students' group comprised 158 participants, 59 male and 98 female ($M_{years} = 14.40$, $SD_{years} = 3.08$). 81 student was from elementary and 77 from high schools. In Croatia elementary school is obligatory, starting at the age of 7 and lasting for 8 years. High school is optional. It starts at the age of 15 and lasts for 3 or 4 years, depending on the type.

Teachers' group consisted of 78 participants, 21 male and 57 female, aging from 26 to 77 years ($M = 39.43$, $SD = 10.38$). Forty of them worked in elementary and 25 in high schools. They were divided in three groups according to their teaching experience: a) up to six years ($n = 27$); b) 7 – 14 years ($n = 25$); and c) 15 years and more ($n = 26$).

Parents' group gathered 148 participants, 76 fathers and 72 mothers, aging from 29 to 62 years ($M = 42.81$, $SD = 5.98$). There was 71 parent of elementary and 65 of high school children.

Measures and procedure

University students of humanities and music had to find: 1) one elementary school student; 2) one high school student; 3) one elementary or high school teacher; 4) one mother of an elementary or high school student; and 5) one father of an elementary or high school student. They asked them: *What are the five most important characteristics of a good teacher? Please explain.*; wrote the answers and demographic data: gender, age, school, length of teachers' employment, and parents' highest level of formal education. They received credits for this task, which was a part of a larger research on attitudes towards teachers' competencies.

Results

The final list comprised 85 characteristics of a good teacher. Elementary school students listed 46 characteristics, high school students 48, teachers 55 and parents

revealed 60. To identify the most important characteristics of a good teacher from the perspective of students, teachers and parents, five most frequent answers were ranked for each group. The list narrowed to 9 characteristics. The most frequent answer in all groups was *fairness*, followed by *patience* for teachers and parents, and *humour* for students. *Teaching skills* were on the third place for students and parents, while *discipline management* was for teachers. On the fourth place students listed *patience*, teachers voted for *teaching skills* and parents for *subject related knowledge*. The fifth characteristic for students was *being a good person*, teachers chose *sensitivity for students* and *creativity*, and parents picked *discipline management*.

When ranks were compared depending on elementary or high school, parents of elementary and high school children provided same answers. For elementary school teachers, the most important characteristic was *fairness*, while it was *discipline management* for their high school colleagues. These characteristics exchanged places at the 2nd position. Both put *teaching skills* on the 2nd or 3rd place and *patience* on the 4th place. Elementary school teachers chose *sensitivity for students* and high school teachers put *creativity* at the 5th position. All students agree *fairness* is the most important feature. Elementary school students continued with *humour*, *being a good person*, *teaching skills* and *patience*. High school students placed *teaching skills* on the 2nd place, then *humour* and *patience* as equally important and *discipline management* at the last place.

For the most experienced teachers the most important characteristic was *patience*, while for two less experienced groups it was *fairness*. However, *fairness* comes at the 2nd position together with *sensitivity for students* for the most experienced teachers, followed by *subject related knowledge*, and *discipline management*. The least experienced teachers put *teaching skills* and *patience* at the 2nd place, followed by *discipline management* and, finally, *sensitivity for students* and *creativity*. For the medium experienced group, *discipline management* is at the 2nd position, *teaching skills* and *patience* follow together and *humour* is at the 5th place.

Discussion

The most desirable characteristics of a good teacher

The maximal number of listed characteristics was 15 (3 groups x 5 characteristics). However, the list consisted of 9, which shows much overlapping in students, teachers and parents' views. It confirmed some Liu and Meng's results (2009). It is probably because all three groups have experience of being students. Students, teachers and parents agree that the most desirable feature of a good teacher is – *fairness*, also described as justice and objectiveness. It means that a good teacher should treat every student in the same way, especially when giving marks. Fairness is a very desirable feature of a good teacher among students (Alkan, 2013; Ciascai & Vlad, 2014; Bakx et al, 2015; Raufelder et al, 2016), teachers (Stronge, Ward & Grant, 2011) and parents (Tatar & Horenczyk, 2000) because it clearly relates to evaluation. Its connection with efficient teaching is confirmed (Stronge, Ward & Grant, 2011).

Teachers and parents then rank *patience* and *calmness*, recognising them as necessary tools to handle numerous and diverse situations they face with students and parents, but also with repeating of similar lectures. Murphy, Delli and Edwards' findings (2004) support this teachers' choice. For the students, patience is also relevant (Vlad & Ciascai, 2014; Bakx et al, 2015), but slightly less. This difference could be ascribed to the age and life experience, especially related to raising children: people with parenting and teaching experience know better than children and young people that much patience is required. Students valued *humour* as a more desirable characteristic, supporting previous findings (Alkan, 2013; Bakx et al, 2015; Raufelder et al, 2016). Humorous means that the atmosphere in the classroom is neither tense nor too serious, but comfortable for learning. Such a setting is, obviously, more important from the students' perspective than from teachers or parents'.

Teaching skills (described as clear explaining, using of simple language etc.) are equally rated by students and parents, and similarly by teachers. Although teacher's *knowledge about the subject* was recognised by parents as important, communicating this knowledge was listed as more relevant. Teaching skills are regularly recognised among top valued features by students (White, 2009; Alkan, 2013) and teachers (Cooper, 2013).

More than teaching skills, teachers estimate *discipline management*. Obviously they are aware of their higher responsibility to organise teaching atmosphere so learning can take place (Klassen & Chiu, 2010), not disruptions. Because of frequent behaviour problems in schoolchildren, it is important that teachers utilise effective strategies to manage the class (Clunies-Ross, Little & Kienhuis, 2008). Parents find this also relevant, but students don't mention it in the top five.

For students it is important that a teacher is a *good person* or *well-intended*. It is the basis of good relationships and it is confirmed in previous research (Vlad & Ciascai, 2014).

Teachers, on the other hand, mention *sensitivity for students* and *creativity*. They find it necessary for a teacher to understand that students have different abilities, expectations, needs, backgrounds, etc. Recognition of such diversity helps them shape their approach to achieve teaching objectives. If teachers have empathy for their students, they will be effective and more satisfied with their teaching (Cooper, 2013). Creativity can be one of the ways to approach children's diversities. There is evidence that teachers position it very highly (De Souza Fleith, 2000). As Sawyer puts it (2011, p. 15): "creative teachers are experts at disciplined improvisation".

Looking from the Korthagen's model, teachers highlighted characteristics of a good teacher mostly from the level of *mission* (fairness, patience, sensitivity for students, creativity) and fewer *competencies* (teaching skills, discipline management), parents listed more from the level of *competencies* (teaching skills, discipline management, subject related knowledge) than *mission* (fairness, patience), and students tackled *mission* (fairness, patience, being a good person), *competencies* (teaching skills), and *behaviour* (humour). The levels of *identity*, *beliefs* and *environment* were not mentioned.

Elementary vs. high school point of view

Elementary and high school children's parents did not differ in their choices. Probably some of the parents in this sample had children in both schools, so they answered regardless of school. Teachers that work in elementary schools and those from high schools ranked the desirable characteristics similarly (fairness, discipline management, teaching skills and patience) with few exchanges of places. Elementary school teachers chose *sensitivity for students* and high school teachers put *creativity* at the 5th position. Elementary school teachers probably see sensitivity for students as more important than high school teachers, because elementary school students differ developmentally more than high school students. High school teachers emphasised creativity, which is maybe more necessary in work with more mature students that have more questions and requests for certain topics.

No particular trends of change in preferred characteristics were observed regarding teachers' experience. However, differently experienced groups listed some specific features. The least experienced group mentioned *creativity*, probably because they still need to articulate many lessons. The middle experienced group put *humour*, maybe because they became more relaxed and comfortable teaching. The most experienced group listed *subject related knowledge* perhaps as a necessity in a constantly changing world.

Although students of both schools agree about the importance of fairness, patience, teaching skills and humour, slight differences were found. Elementary school students strongly emphasized *humour*, explicitly by telling jokes. This was found in previous research (Alkan, 2013). They obviously cherish a more joyful atmosphere than the high school students. They also see a good teacher as a *good person*, someone who is well-intended, probably associating him/her to a person that creates a protective atmosphere. High school students recognise *discipline management* as important maybe because they better understand that lack of discipline interferes with learning. Such preference among older students was found in other research (Bakx et al, 2015).

Compared with the Korthagen's model, characteristics of a good teacher in elementary and high schools are identified mostly from the level of *mission* (fairness, patience) and *competencies* (teaching skills, discipline management) and least – *behaviour* (humour). At the level of *mission*, students from elementary schools additionally mention that a good teacher should be a good person, while high school teachers put creativity.

The results of this research contribute scientifically to Korthagen's model. They can also be used in work with teachers, students and parents to reflect on their perspectives of a good teacher and in curriculum of preservice teacher education.

Conclusion

The most desirable characteristics of a good teacher from the students, teachers and parents' perspective are fairness, patience and teaching skills. According to Korthagen's model of levels of change, the listed characteristics fit mostly in the level of mission, and less in the level of competencies, proving so that the model can be used for teacher's features' analysis. The limitations of the study can be the lack of anonymity in giving answers, because participants were interviewed and the

cultural restriction only to one country. In future research the list of desirable characteristics could be categorised and compared. Other groups of participants can be included, such as student teachers and university teachers that teach them. Further analyses can be made, based on gender. It could also be interesting to explore how characteristics of bad teachers fit the same model. In addition to this cross-sectional design, longitudinal research could provide data on developmental trends in assessing desirable characteristics of a good teacher.

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Personality Traits and Learning Styles of Secondary School Students in Serbia

Abstract

This paper is concerned with the personality dimensions and learning styles of secondary school students, attending grammar and technical vocational school. The aim of the study is to examine differences in personality traits and learning styles between students from these types of schools, as well as to determine the predictive power of personality traits for certain learning styles of students. The sample consists of 240 fourth-year students attending grammar (120) and secondary technical school (120). Research variables were measured by *NEO PI-R Personality Inventory* (according to Five-factor model) and *Index of Learning Styles* (developed within Felder-Silverman's model). The results show that grammar school students, compared with technical school students, have higher level of all personality dimensions except the Neuroticism, which is higher in technical school students. Grammar school students have higher measures of Sensor, Active and Sequential styles than students from technical school. Multiple regression analysis has shown that certain learning styles could be predicted by some personality traits. In grammar school sub-sample Openness seems to be the best predictor while Consciousness is significant predictor of learning styles in technical school. The findings are discussed in the light of possibility for better understanding the personality-learning-teaching relationships that could contribute to more effective individualization of teaching process.

Keywords: personality traits, Five-factor model, learning styles, secondary school students

Introduction

The research reported on in this paper is concerned with personality traits and learning styles of secondary school students. Starting point of the study is a plenty of research findings which confirm the correlation of academic success with both personal and cognitive factors (Bratko et al, 2006; Busato et al, 1999; Furnham et al, 2003; Poropat, 2009) as well as the assumption that personality traits and learning styles are interrelated. The importance of this research problem stems from the belief that better understanding of relationship between these variables could contribute to more effective support of students through individualization of teaching process.

One of the key issues in the study of personality is a question of its structure. The most widely accepted model, based on the lexical approach, stands out five broad personality dimensions: Neuroticism, Extraversion, Openness, Agreeableness and Conscientiousness. This taxonomy was confirmed in numerous studies, showing a significant degree of cross-cultural, linguistic and methodological invariance. Well-known operationalization of the **Five-factor model** is proposed by Costa and McCrae (1992), who also developed Personality Inventory NEO-PI-R. The model implies a hierarchical structure of personality. There are five broad domains at the top of the hierarchy, which encompassed 30 narrow personality traits or facets (six facets build one domain). Each trait and domain is seen as bipolar dimensions and people differ only in the extent of them (Costa & McCrae, 1992).

Neuroticism (N) – refers to the general tendency to experience negative affects such as fear, sadness, anxiety, anger and guilt. People with high Neuroticism are prone to irrational ideas; they poorly control their impulses and have less capacity to overcome stressful situations. Individuals with low Neuroticism are emotionally stable, calm, relaxed and are able to cope with stressful situations without the anxiety or panic.

Extraversion (E) – Extraverts are sociable, assertive, active and talkative, cheerful by nature, they like people and prefer large groups, enjoy the excitement and stimulation. Introverts tend to be reserved (which does not mean antisocial), introspective, quiet and moderate.

Openness (O) – refers to intellectual curiosity and open-mindedness for new experiences, new ideas and unconventional values. Openness is related to intelligence and creativity. People with low Openness show conventional behavior, conservative look and posture, prefer known in relation to the new, have narrower and less intensive interests.

Agreeableness (A) – is a dimension of interpersonal tendencies. Agreeable person is altruistic, sympathizes and empathizes with other people, willing to help them and believing that other people will show the same toward him/her. A person with low Agreeableness is egocentric, skeptical about the actions of other people and competitive-minded.

Conscientiousness (C) – refers to dutifulness, self-discipline and responsibility. Highly expressed C is linked to academic and professional success. People with lower C score are less dedicated to achieving the objectives, but more oriented towards personal pleasures. These people have a more relaxed attitude towards moral principles (which does not necessarily mean that they are immoral persons).

Numerous studies (Poropat, 2009) show that basic personality dimensions are good predictors of academic success, especially at higher education context. The most consistent findings refer to the correlation between Conscientiousness and school achievement. Also many authors reports about connectedness between learning styles and personality traits (Busato et al, 1998) so it is useful to explore these personal characteristics together.

Learning styles may simply be described as the ways in which people learn the easiest and most often (Đigić, 2012). Some authors consider learning styles as personality traits that include different aspects of the individual's functioning (cognitive, affective, physiological) in a learning situation (Keefe, 1987). Classifications of learning styles are based on different criteria: personality traits, the way of information processing, neuro-physiological basis of certain mental functions, stages of experiential learning, perceptual modalities of cognitive functioning.

One of common used is Felder-Silverman model of learning styles which is determined by the mode of reception and processing information (Felder & Silverman, 1988). Learning styles vary depending on the answers to four questions: (1) Which type of information a person prefers to use: *sensory*, external (visual information, sounds, physical sensations) or *intuitive*, internal (opportunities, insights)? (2) What type of sensory information is easier for a person to perceive: *visual* (pictures, diagrams, graphs, demonstrations), or *auditory* (words, sound)? (3) Which way of information processing characterizes the person: *active* (through

participation in a practical activities or discussion) or *reflective* (through introspection)? (4) What kind of progress in understanding learning content is person's characteristic: *sequential* (step by step) or *global* (bouncy, holistic)?

One of recently conducted studies into individual differences in learning styles among secondary and high school students (Alumran, 2008) showed that Visual style is the most common, and that Active, Sensory and Sequential are more frequent than Reflective, Intuitive and Global style. It is shown that Visual style was negatively correlated while Sequential style was positively correlated to school achievement. Some differences in learning styles were found among students of different professional orientations. Also some empirical findings suggest that characteristics of personality may be important in studying learning styles. Starting from these findings, we have designed the research being reported in this paper.

Method

The research problem referred to the profile of personality and learning styles of secondary school students. Three research questions were posed:

(1) Are there differences in the level of certain personality dimensions between students attending grammar and technical schools?

(2) Are there differences in the level of some learning styles among students of grammar and technical schools?

(3) Could certain learning styles be predicted by the dimensions of personality of students?

Participants: The sample consisted of 240 four-grade students attending two different types of secondary schools in Serbia: grammar school (N=120) and vocational technical school (N=120), 126 (52.5%) males and 114 (47.5%) females.

Measures: Dimensions of personality were defined according to Five-factor Model (Costa & McCrae, 1992) and measured by *NEO PI-R Personality Inventory*, revised in Serbia (Đurić-Jočić et al, 2004). The questionnaire consists of 240 statements using five-point Likert-like formats, intending to measure five broad domains of personality and 30 facets. The instrument showed good psychometric properties in Serbian population (Knežević et al, 2004). Cronbach Alpha coefficients obtained from our sample range from .81 to .85.

Learning styles were based on Felder-Silverman model (Felder & Silverman, 1988) and measured by *Index of Learning Styles* (Solomon & Felder, 2014). The original questionnaire consisted of 44 pairs of items and respondent answered by selecting one of two offered claims choosing better fit for him/her. For the purposes of this study, the instrument was converted to a Likert-like formats (strongly disagree, disagree, neutral, agree, and strongly agree) and respondent is asked to answer to 88 items. Each of eight learning styles (Sensory, Intuitive, Visual, Verbal, Active, Reflective, Sequential, Global), is assessed by 11 statements. Cronbach Alphas ranged from .65 to .76 (most of them were above .70).

Procedure and data analysis: The survey was conducted during the school lessons. Before completing the questionnaires, students were informed about the objectives of the research which was anonymously. Their participation was completely voluntary. SPSS 18.0 was used to perform necessary statistical analysis.

Results and discussion

Personality dimensions

Data showed that secondary school students from our sample scored 30-50 points higher on all personality domains in comparison with Serbian normative sample (Knežević et al, 2004). Means for measured dimensions were: $M=140.31$, $SD=18.92$ (Neuroticism), $M=151.86$, $SD=11.64$ (Extraversion), $M=151.95$, $SD=12.58$ (Openness), $M=150.76$, $SD=13.22$ (Agreeableness) and $M=157.07$, $SD=19.06$ (Conscientiousness). These differences could be partially explained by sample characteristics, sample size and age differences of participants from these two surveys. For example, Serbian normative sample consisted of people aged 18 to 65 years while our sample included only 19 years old students. Also, the time distance between two surveys could be the reason for obtained differences.

In order to determine whether there are significant differences in the level of personality dimensions between two groups of students, t-tests was used. Technical school students were higher on Neuroticism ($t=4.877$, $p<.001$) and lower on the other four dimensions than grammar school students: Extraversion ($t=2.385$, $p<.018$), Openness ($t=2.426$, $p<.016$), Agreeableness ($t=3.914$, $p<.000$), Conscientiousness ($t=4.584$, $p<.000$). It means that technical school students showed disposition to be more emotionally unstable, anxious, depressive and impulsive than their peers from grammar school. This finding was unexpected because the majority of students of technical school were males while many previous studies revealed that this disposition is to a large extent the characteristic of females (Costa & McCrae, 1992; Đurić-Jočić et al, 2004; Stojiljković, 2014). It should be noted that students of technical school mostly come from families that have a lower level of education, their parents are therefore paid less or more often remain unemployed, especially at a time of social crisis and the transitional period. This can contribute to creating an atmosphere of insecurity as a result of what may increase anxiety and pessimism in children who grow up in these circumstances. On the other hand, higher scores on personality dimensions E, O, A and C indicated that grammar school students are, in comparison with their peers from technical school, more sociable, active, assertive, cooperative, intellectually curious and open to new experiences, self-confident and more optimistic.

These findings can be understood from the perspective of Holland's typology and belief that there is a connection between personality traits and occupational interests. According to this model, people choose the occupation that fits their personality traits (Holland, 1997). Some studies showed that Investigative, Social and Artistic type are more present in grammar than in technical school students and positively correlated to Extraversion, Openness and Agreeableness (Hedrih, 2008; 2009; Larson et al, 2002). It is well-known that grammar school students set to themselves higher academic goals and tend to reach better school achievement so it is expected higher Conscientiousness in these students.

Learning styles

Starting from Felder and Silverman (1988) understanding that each person uses many different learning styles, combining them to enable the most effective learning, the research was aimed to determine learning styles profile of students

attending different types of schools. Firstly the average scores were calculated as measures of eight learning styles which represent extremes of four dimensions: Sensor – Intuitive, Visual – Verbal, Active – Reflective, and Sequential – Global. All obtained means were higher than theoretically expected means (33.00), ranged from $M=35.67$, $SD=6.37$ for Global style to $M=38.31$, $SD=7.56$ for Active style. It could mean that students are ready to accommodate to the requests of different school subjects and learning tasks making different learning styles' combinations in accordance with particular school subject. Also, such finding could be the result of balanced education (Felder & Brent, 2005) which contributes to development of different learning styles. Intuitive, Reflective and Global learning styles tend to be considered as connected to creativity (Maksić, 2006) but students from our sample showed lower measures on them than on the other ones. If we believe in the influence of education on development of learning styles, this finding raised question whether Serbian education is less oriented to development of styles related to creative thinking.

Using t-test it was determined that grammar school students, compared with technical school students, have higher measures of three learning styles: Sensor ($t=2.979$, $p<.003$), Active ($t=3.910$, $p<.000$) and Sequential ($t=3.248$, $p<.001$). This is in line with results from Alumran's (2008) investigation. The question is whether this finding is consistent with the results of a recent longitudinal study (Felder & Brent, 2005) which showed that students belonging to Intuitive type were more successful in abstract learning, while students belonging to Sensor type were more successful in practical learning. Having in mind the nature of main learning tasks in grammar and in technical school it is important to explain the fact that students in grammar school scored higher on Sensor style than students attending technical school.

Prediction of learning styles by personality dimensions

Starting from the point of view that concept of learning styles refers to a complex construct which is partly related to personality traits (Montgomery & Groat, 1998) the regression analysis was performed in order to determine whether it is possible to predict some learning styles by personality dimensions. Precisely, multiple regression analysis was used to determine the predictive power of personality dimensions on Sensor, Active and Sequential learning styles (because they make difference among students of grammar and technical schools).

Data obtained in our students sample showed following:

(1) When the whole students sample is observed, the regression model including personality dimensions explains 23.0% of the variance in Sensor learning style by two significant predictors – Openness ($Beta=.208$, $p<.002$) and Conscientiousness ($Beta=.258$, $p<.005$); 21.6% of variance in Active style by three significant predictors – Openness ($Beta=.237$, $p<.000$), Conscientiousness ($Beta=.208$, $p<.023$) and Extraversion ($Beta=.174$, $p<.004$); only 8.4% of variance in Sequential style is explained by Openness ($Beta=.232$, $p<.001$).

(2) The regression models explain greater amount of learning styles variance in grammar school students' sub-sample than in a whole research sample. Openness ($Beta=.264$, $p<.002$) and Agreeableness ($Beta=.271$, $p<.021$) could predict 37.3% of variance in Sensor style. 25.3% of variance in Active style could be predicted by

Openness ($\text{Beta}=.351, p<.000$) and 18.5% of variance in Sequential style could be predicted by Extraversion ($\text{Beta}=-.342, p<.000$) and Openness ($\text{Beta}=.267, p<.006$). Openness has shown as the best predictor of all learning styles.

(3) The regression model explains a much smaller percentage of the variance of learning styles in the sub-sample of students of technical schools, compared with the sub-sample of grammar school students. Conscientiousness ($\text{Beta}=.224, p<.018$) could predict 13.6% of Sensor style, Conscientiousness ($\text{Beta}=.199, p<.033$) and Extraversion ($\text{Beta}=.223, p<.018$) could predict Active style but model is not statistically significant for Sequential style.

Conclusion

The research findings have shown that there are some differences between students attending grammar and technical school regarding the level of all five personality dimensions and of three learning styles (Sensor, Active and Sequential). As well, it was found that these learning styles could be predicted on the bases of personality traits but prediction is better in grammar school sub-sample than in the other one. Openness seems to be the best predictor of learning styles in grammar school while Conscientiousness is shown as the best predictor in technical vocational schools.

The results suggest that higher measures of Sensor, Active and Sequential learning styles in grammar than in technical school students could be partly explained by differences in personality profile of adolescents who choose to attend grammar schools and technical vocational schools respectively. On the other hand, this finding is in line with Holland's emphasizing that there is a link between personality traits and occupational interests as well as personality traits relevance in the choice of profession and occupation.

Considering practical implications of the results, it is clear that knowing students' personality characteristics and learning styles could contribute to more effective support of students through individualization of teaching process. It is useful to keep in mind that there is no unambiguous consent of the researchers related to instructional methods that are the most effective for students with certain learning styles (Pashler et al, 2008).

So, additional research is needed in this area. On the basis of recent knowledge, it could be suggested use of the variety of instructional methods and learning tasks, aimed to arise different kinds of thinking and to deal with different students' learning styles. Finally, in our opinion, the results of this research indicate that Serbian teachers should consider how to change their instructional practice in order to contribute to the development of the learning styles mainly connected to creative thinking (Intuitive, Reflective and Global style).

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Part 3

Education Policy, Reforms & School Leadership

Gillian Hilton

Routes into Teaching: Does Variety Aid Recruitment or Merely Cause Confusion? A Study of Three Different Programmes for Teacher Training in England

Abstract

This paper discusses the recent rise in teacher recruitment problems in England and examines possible causes. These are varied, but a main cause appears to be the increased variety of programmes on offer, which, it appears, is confusing applicants. Three different programme's trainees were asked to complete questionnaires at the start of their study, to ascertain why they had chosen that programme and what their expectations of it were. Follow up interviews of a small number of trainees was completed one term into the programmes to discover how trainees were progressing. Results showed that trainees lacked clear understanding of what the programmes offered and were very influenced by their previous experiences in education and employment when choosing a training route.

Keywords: teacher training, school direct, PGCE, teacher recruitment

Introduction

England is facing a teacher recruitment crisis demonstrated by articles in education papers claiming that schools are so concerned that they were, in December 2015, advertising vacancies for September 2016, something not normally occurring till the summer term (Busby, 2016a). The cause of this problem, which has resulted in the Department for Education (DfE) sending teams to Commonwealth countries to recruit teachers, whilst denying there is a crisis (Stewart, 2015) and the education press reporting that one in six new teachers in England is from overseas (Wiggins, 2015) has many roots. Firstly, as a result of the recent economic crisis, public sector pay in England has been frozen for some time and teachers now are subject to a performance related pay structure and many, it appears, will miss out on any rise in income this year. At the same time, the pay and available jobs in the private sector have risen, making teaching less popular as a choice of career, despite a much criticized advert put out by the DfE, detailing a starting salary of £30,000 not possible for most applicants to the profession. In addition, it appears that government moves to put training into schools and provide a multitude of routes to teaching has resulted in confusion amongst possible recruits, as there is so much choice on offer. Noble-Rogers, Executive Director of University Council for the Education of Teachers, though admitting that the variety of programmes offered choice to prospective trainees, pointed to the fact that there was a great deal of

overlap between the programmes and that the National College for Teaching and Leadership (NCTL) was suggesting students could change between different routes during training, to ensure places were filled, making it impossible to differentiate between routes (Morrison, 2015). Also, a recent change by government regarding the allocation of places for training, has led to a scramble to recruit early (Howson, 2015). The education press have labelled this a ‘melt down’ as allocations have been removed and programmes told to recruit freely until a national stop is applied by the NCTL (Ward, 2015a). This has led to further confusion, with applicants applying to programmes which have been informed there are no more places available for them to offer (e.g. secondary physical education and history) and a concern that better qualified applicants, who apply at a later date, may not be allocated places in the concern of programmes to recruit early. Despite shortage subjects (maths, chemistry, physics, foreign languages and computing) specialists now being offered pay rises far beyond those available to most teachers, there is a national problem, exacerbated by the numbers leaving the profession early, in some cases never taking up a post after training, seeing teaching with long hours and a lack of status, as a temporary career (Hilton & Tyler, 2015). The move towards school-based, as opposed to university training, has also had an effect as School Direct (SD), where schools lead in the recruitment and training of teachers, has not fully recruited since inception. This programme was introduced by the then Secretary of State for Education as a way of helping schools to train the teachers they needed, rather than a government department controlling numbers. He believed that it was better to learn to teach ‘as an apprentice observing a master craftsman or woman’ rather than through an academic programme, as teaching is a craft (TES, 2010, p. 10). Hilton (2012, p. 165) questioned this view of how teachers need to be educated, ‘who will be responsible for developing the professional aspects of a teacher’s knowledge’? However, NCTL still has the power to control the numbers of teachers trained and SD has, in the opinion of many been one of the causes of the recruitment crisis and is lowering standards of training due to the burgeoning numbers of training groups now being accredited (Howson in Ward, 2015c).

To add to the confusion the government slashed the budget for the training of primary teachers from 2016 and also the allowance affecting the School Direct programme, where many recruits receive a salary as an untrained teacher whilst on the programme. This has resulted in schools, who had offered a School Direct training place, now withdrawing that offer, as they cannot afford the salary for the trainee (Peacock in Ward, 2015b).

At present the options available for training include, the Post Graduate Certificate of Education (PGCE) which includes Qualified Teacher Status (QTS) and may have modules which count towards a Master’s qualification. PGCEs are run by a variety of providers and generally based in, or linked to higher education institutions (HEIs), School Direct training is run by a group of schools and offers QTS at the end of the programme and possibly a PGCE or even a Master’s qualification. This programme can be salaried or unsalaried, the former being intended for trainees with two or three years’ experience after obtaining a degree. School Centred Initial Teacher Training (SCITT) programmes are run by a group of schools or a training provider and offer PGCE or SD programmes and possibly Master’s credits. There are programmes for teaching early years groups (EYITT),

and teacher training for the post-compulsory sector, Teach First, is intended for high achieving graduates who are given a six week training course, then placed into challenging schools in inner cities. A two year development programme is followed, after which trainees can expect rapid promotion or leave and follow another career. There are also training programmes for teaching English as a foreign language, one to train teacher researchers in schools and an initiative to train members of the armed forces as teachers. It is easy therefore to understand why prospective trainees may be confused by all these options and be unsure of which route to choose. Certainly when global comparisons are made, the myriad ways offered to train as a teacher in England can appear daunting to prospective candidates and to providers of the programmes, It has to be asked is this over-complication self-defeating in a time of recruitment difficulties? Now NCTL has commissioned research into student satisfaction with the different programmes and alarm has been expressed at the experiential growth in the numbers of providers, putting pressure on Ofsted inspection teams and raising questions about how quality will be maintained.

Research

This research was with trainees following three different programmes training as primary teachers. Two different SD programmes and one PGCE, were used with the aim of discovering why trainees chose a particular programme to attend and their initial expectations of what the programme would offer. In addition questions were asked to attempt to ascertain, in the first weeks of the programme, the extent of trainees' understanding of how their training would be organized. School Direct 1 (SD1) was run by a well-established SCITT and used university tutors as visiting assessors and advisers. School Direct 2 (SD2) was a newly formed programme started by a group of schools who wished to provide their own teachers and had just been registered as a new provider by NCTL. The PGCE programme was run by a SCITT in conjunction with a local university which provided theoretical input and assessment support. An initial questionnaire was issued to trainees on all three programmes, with follow up interviews of one respondent from each group after one term of training, to discover trainee's thoughts on their experiences.

Respondents

Respondents of the voluntary questionnaire were SD1 25 females and 3 males, SD2 13 females, 2 males. PGCE 15 females, 1 male. These were fairly representative of the primary school workforce which is heavily biased towards females. Ages for those on the PGCE programme were concentrated in the 21-30 age group (only one in the 31-40 group) and the two SD programmes had a somewhat higher age range for trainees including 9 aged 31-40 and 3 aged 41-50. This is possibly due to the fact that many of the SD trainees had already been working in schools in the capacity of Learning and Teaching Assistants (LTAs) or Learning Support Assistants (LSAs). The vast majority of the respondents were white, with a small varied sample of Asians from Pakistani or Indian groups and black students from Africa and the Caribbean (under 2% for the combined respondents). SD1 had 26 trainees who were on the salaried programme and 2 who received no salary whilst, SD2 had 12 who were salaried and 3 unsalaried trainees. The PGCE programme is liable to the normal fees for study in England with no

salary, but some trainees do receive a bursary if they are training for shortage subjects. The groups were training for Early years/KS1 or KS1/2 with the bias in all three programmes to the KS1/2 group. All trainees have to study to work with two Key Stages but in both SD1 and the PGCE groups 2 trainees thought they were training for Early Years/KS1 and KS2 showing some confusion as to what programme they were following. PGCE trainees have a subject specialism but at this stage in the programme only eight had firmly chosen their specialist subject area, five chose English, 2 maths and one science. SD trainees do not have a subject specialism.

Reasons for choosing their programme

When asked why they chose the particular programme there were clear differences between SD1 and 2 and those on the PGCE programme. SD1 and SD2 had overall just under 45% saying they were already working in a school (generally as an LSA /LTA) so it was a natural progression. For the PGCE group only 1 of the group of 15 had already worked in a school (6.6%). In SD1 and 2 the response, 'it suits my learning style', that is, hands on in the classroom was very popular with over 45% of respondents ticking this option but for PGCE the response was even higher at 75%. As these students were on the whole younger and closer to their degree study, it is possible that, used to university theoretical approaches, PGCE seemed a more natural route to choose. In addition two of the PGCE group added an additional reason for their choice, that in their opinion a PGCE was more likely to enable them to work overseas rather than merely gaining QTS as provided on many SD programmes. It will be interesting to see if foreign employers begin to discriminate between these different qualifications in the future. For the two SD groups nearly 50% choose 'I need the salary' as one of their reasons for selecting to follow the SD route into teaching, whilst all groups when asked to consider as to whether school based or university based training was a better option, in the SD groups almost 80% considered school based training better, but for PGCE only 2 from 16 respondents selected the, university training is better than school based option. No reasons were given for these choices but the numbers of SD trainees who had previously worked in schools made their answers, to some extent predictable, though there is little evidence to support this choice.

Theoretical input

When all trainees were asked about the time they would spend on studying theory on the programme it was obvious that the PGCE group had a much clearer understanding of how their theory training would proceed. All respondents explained that they were, at the start of the programme, having intensive input on theory areas (as is the case on all PGCE programmes nationally), this group spending seven hours on three to four days a week studying theory at the time of questionnaire completion. Later, they all knew that would reduce to about one day per week of theoretical study. All these trainees were aware that their theory training would take place in the SCITT premises where SCITT tutors and visiting university tutors would be responsible for the input. Fourteen of the group thought that the theory training would be very useful, one was unsure and one not looking forward to it. The two groups of SD trainees were, in most cases, positive about the theoretical

input, only two feeling it would be a waste of time, but rather more than from the PGCE group, not looking forward to it. However, both SD groups were unclear as to how much time would be devoted to theory, one respondent saying almost no time, to others thinking ten hours weekly with others giving a variety of answers. As the time spent (one day per week) is clearly set out in the documentation this lack of understanding of the programme they have undertaken gives cause for concern. There was also confusion as to where the theory element would take place, several saying in different schools, others in the SCITT premises, even two thinking they would attend a university.

Staff involved in their training

When asked what other staff, in addition to their mentor, would be involved in their training, in most cases there was some lack of clarity as to who would be involved and for all three groups the 'don't know' category was chosen by around 50% of respondents, with others choosing a variety, headed by the class teacher who was not their mentor, followed by members of the senior management team and one or two in each group added LTAs to one from SD1 adding the SD Coordinator. There was equal confusion as to who would be available to help if the trainee experienced problems with their mentor. In this category most of the PGCE trainees were unsure 90% ticking 'don't know' which is understandable as at that stage they were still undertaking the intense theoretical part of the training with only a short time allotted for school visits. The SD groups 1 and 2 were more positive that senior staff would be available to help, but not particularly clear at this stage as to who that person would be. The PGCE group knew that they would be visited by a university based tutor as the SCITT providing the training worked closely with a university and SD1 also used some of these tutors. SD2 the new provider is not using university tutors to oversee training. Trainees working with this new provider were less sure about what their training would entail than those attending the PGCE and SCITT based routes.

Visits to other classes and schools during training

PGCE trainees were very positive about this as they would be visiting a variety of classes and schools only one respondent saying no to the visiting other schools category, though later this person ticked visits to a special school. Most of the SD trainees also believed they would be seeing other classes, almost 90% ticking yes to this question and the majority believing that they would be seeing other key stage groups as part of their training. PGCE trainees had obviously been informed that they would visit a special school as 100% ticked this option. It appeared from the SD groups that SD1 appeared to be more sure of what visits would be made than those in the SD2 group, whose answers were so varied they appeared to be guess work in most cases.

Follow up interviews

These were carried out after one term of training but only one trainee from each group responded due to the intense pressure of the training programmes. The PGCE trainee was on the whole positive about the experience, though finding it very hard work, she appreciated the initial theoretical input. To some extent the respondents

from SD1 and 2 were finding some things harder than they had expected ‘though the feedback is generally positive I often feel overwhelmed and stressed as the expectations are so high’. SD1 trainee suggested that they needed more input on completing assignments as, it was a long time since they had done academic work. She was also unhappy with the conflicting advice from different staff, but very happy with the visiting SCITT tutor. All three found time a real problem, especially finding sufficient time to discuss their progress with their mentor, who in most cases was under intense pressure. The trainee from SD2 admitted that she was in some cases struggling, as she had to do things very much at the last minute without sufficient time for preparation, asserting that she was often expected to suddenly take over teaching the entire class with little warning, which was very stressful ‘I feel like I am sometimes expected to just know things that I haven’t been told about or ever come across before’. However, she admitted that she now found the theoretical aspect of the training of real use and that it had been timely in its relation to her needs. Both the SD trainees appeared to be shocked about the responsibility and amount of work that had been thrust upon them, more than had expected. This was not echoed in the response of the PGCE respondent, who appeared to have experienced a more measured approach to undertaking whole class responsibility. All three trainees admitted they had learned a lot from their first term, especially from seeing other teachers and a variety of methods and approaches used for teaching and learning.

Conclusion

The problems are deepening as, according to The National Audit Office (NAO) in a report for the Department for Education (2016) the shortage of teachers is increasing as, yet again, recruitment targets have been missed, following a four year pattern. The report suggested Ministers have a ‘weak understanding of local teacher shortages’ (National Audit Office, 2016, no page) taking a national view rather than examining local problems. The policy of broadening training routes is criticised and questions asked as to the costs of this diversity as it appears to confuse applicants who, it appears, lack the necessary information to make informed choices, so the seven hundred million spent yearly on recruiting and training teachers is not providing value for money. The shortages are particularly acute in the secondary sector with fourteen out of the seventeen secondary subjects failing to recruit to target, but now primary schools too are finding it impossible to recruit and retain enough teachers (Burns, 2016). It also appears that the bid to bring in overseas teachers has resulted in a high proportion quitting their jobs and returning home, or changing to supply teaching as they were unable to cope with the excessive work load placed upon teachers in England, with more marking, recording and planning than they were used to (Busby, 2016b) a problem also raised by teacher unions in response to the NAO Report. In addition the Troops to Teachers initiative is failing to recruit to target and also suffering a high drop-out rate (Ward, 2016). The NAO Report also details the massive rise in the variety of providers now training teachers and the resulting difficulty of assessing the quality of this provision, due to the large number of new groups working in the field. This field work research, to some extent despite its limited range, underpins what was found in the NAO Report, which questioned the sense of the varying types of provision.

Difficulties in recruiting and retaining teachers in England, when compared to the rest of the world, show that this is a common phenomenon but one not experienced in England for several decades, apart from in a few subject areas. The question must be asked, is the crisis due, at least in part, to the plethora of routes into teaching which appears to be putting off applicants, as opposed to encouraging them into the profession? As yet this is difficult to prove, but the NAO has clearly raised this question for the DfE to consider. In addition, the government's decision to cut the funding available for trainee salaries for SD programmes is sure to have a detrimental effect on recruitment, as many of the SD trainees need to continue to earn a salary and schools are withdrawing offers of places as they cannot afford to pay trainees. The future for teacher recruitment in England is not encouraging.

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Corene de Wet

The Status of Teaching as a Profession in South Africa

Abstract

Using ten universally accepted criteria for a profession and following the Structural-Functional Model of professionalism, this study evaluates the status of teaching as a profession in South Africa. The study found that policies and structures have been put in place since the beginning of the new millennium to enhance the professional status of teachers. The study nevertheless highlights numerous obstacles hindering the professionalisation of teaching in South Africa.

Introduction

South Africa spends 18.5% of its annual budget on education. Yet, the education system remains in a poor state of affairs (Modisaotsile, 2012). Statements, such as ‘South African schools indeed dysfunctional’ (Wilkinson, 2015, p. 2); ‘South Africa’s education crisis’ (Spaull, 2013, p. 1); and ‘schooling in South Africa is a national disaster’ (Bloch, 2009, p. 58) are not uncommon when academics and laypersons talk about schooling in South Africa. Countless reasons for the failure of schooling in South Africa, among other things the lack of professionalism among teachers, have been identified (Bloch, 2009; Spaull, 2013). At an education conference, Jakes Gerwel said that ‘teachers have a social and moral obligation to reclaim their profession and restore its dignity’ (*The Teacher*, 2001, p. 3). In 2013 the Public Service and Administration Minister, Lindiwe Sisulu called for the ‘restoration of professionalism in teaching’ (in Mabaya, 2013, p. 24). If South African teachers have put the teaching profession in disrepute, the profession will fail its learners, especially those living in poverty stricken areas. It is therefore important to determine if and to what extent South African teachers have responded to the challenge to ‘reclaim’ and ‘restore’ teaching as a profession.

Using universally accepted criteria for a profession (De Vos, Schulze & Patel, 2005; Ingersoll & Perda, 2008), and following the Structural-Functional Model of professionalism (Emener & Cottone, 1989), this paper evaluates the status of teaching as a profession in South Africa.

Discussion

Criterion: the credentials of a profession

Professional work involves highly complex sets of skills, intellectual functioning and knowledge that are not easily acquired and not widely held. Entry into professions requires a licence, which is obtained only after the completion of an officially sanctioned training programme and passage of examination (Ingersoll & Perda, 2008).

In 1984 70% of black teachers in South Africa were inadequately qualified (Jacobs, 1989). Since the demise of apartheid steps were taken to restructure and improve teacher qualifications. The majority of teachers in South Africa did not

have a four-year teaching qualification at the turn of the century. According to 2000 statistics 23.9% of the teaching corps was below the Required Education Qualification Value (REQV) 13 benchmark qualification (*cf.* Heystek & Lethoko, 2001). In order to address this problem, the Department of Education (DoE), teacher unions and teacher training institutions worked together to develop a new qualification framework. This led to the introduction of a four-year teacher training qualification and the prerequisite that all newly qualified teachers must hold a degree. All teacher training was moved from teacher training colleges to universities. Numerous upgrading courses were developed and introduced by universities to give teachers the opportunity to upgrade their qualifications. Despite these opportunities, the situation regarding un- and under-qualified teachers has not improved. In 2013 there were 7076 unqualified teachers on the DoE's payroll. These are teachers who have only Grade 12, a school qualification. There were also 2642 under-qualified teachers in the country, who have completed Grade 12 and who only have one or two years of tertiary studies under their belts (The Midrand Forum, 2013).

Criterion: specialisation

Ingersoll and Perda (2008, p. 111) write that 'professionals are not generalists, amateurs, or dilettantes, but possess expertise over a specific body of knowledge and skill'. In line with this criterion the *Norms and Standards for Educators* (RSA, 2002, p. 13) specifies that teachers should be a 'learning area/subject/discipline/phase specialist'. To strengthen the subject and pedagogical knowledge of teachers the 2011 *Minimum Requirements for Teacher Education Qualifications* made a Bachelor of Education Degree or Advanced Diploma in Teaching (both NQF level 7) the minimum teacher academic and professional qualification in South Africa. The policy document specified clear requirements and guidelines for teacher qualifications and learning programmes which were to address the poor content and conceptual knowledge among South African teachers (De Clercq, 2013).

Investigating the phenomenon known as 'out-of-field teaching', the extent to which teachers are assigned to teach *subjects* which do not match their fields of speciality and training, De Wet (2004) found that it is not uncommon for secondary school teachers in South Africa to teach subjects outside their field of specialisation. According to De Wet (2004, p. 157) these teachers' teaching is characterised by 'a lack of academic and professional knowledge and diligence'. The Southern and Eastern African Consortium for Monitoring Educational Quality (SACMEQ, 2007 in Spaull, 2013) tested Grade 6 teachers' knowledge of Grade 6 Mathematics. An analysis of this data shows that many South African mathematics teachers have below-basic levels of content knowledge, with high proportions of teachers being unable to answer questions aimed at their learners.

Criterion: the induction of new practitioners upon entering the profession

In addition to initial formal training, professional work often requires extensive training for new practitioners upon entry. Such training is designed to pick up where pre-service training has left off. The objectives of induction programmes are to aid new practitioners to adjust to the environment, to familiarise them with the realities

of their jobs and to filter out those with substandard levels of skill and knowledge (Ingersoll & Perda, 2008).

Legislation in South Africa requires that schools play an active role ‘to ensure that there is skills development within their teaching cohorts’ (Dale-Jones, 2014, p. 1). Yet, induction programmes for novice teachers are a rarity, and if they take place, they are usually unplanned and informal (Botha, 2011). As a result ‘newly appointed teachers get a reality shock at the discrepancy between the theory (ideals) and the practice (reality) of teaching ... teachers are left alone to either swim or sink’ (Botha, 2011, p. 411).

Criterion: continuous professional development

Beyond both pre-service training and mentoring for beginners, most professions usually require ongoing in-service development and growth throughout their careers. The supposition is that achieving professional-level mastery of complex skills and knowledge is a continuous process. Professionals should continually update their skills, as the body of technology, skills and knowledge advances (Ingersoll & Perda, 2008).

According to the *Norms and Standards for Educators* (RSA, 2002, p. 13) South African teachers should strive to achieve ‘ongoing personal, academic, occupational and professional growth through pursuing reflective study and research in their learning area, in broader professional and educational matters, and in other related fields’. The 2007 *National Policy Framework for Teacher Education and Development* (NPFTEd) gave conceptual coherence to the teacher education system, and committed the DoE to support continuing professional teacher development (CPTD) activities. The NPFTEd document specifies that teachers have to accumulate a minimum of 150 CPTD points every three years (De Clercq, 2013). The 2011 *Integrated Strategic Planning for Teacher Education and Development in South Africa* set aside funds for the establishment of national and provincial teacher development institutes, district teacher development centres and the establishment of ‘professional learning communities’ (De Clercq, 2013, p. 46). Steps have been taken to operationalise the CPTD system. A total of 6500 principals and their deputies have, for example, signed up for participation in the South African Council of Educators (SACE) CPTD system in 2013. The DBE also signed a memorandum of agreement with teacher unions to facilitate the achievement of CPTD targets (DBE, 2014). The underlying principle for CPTD is that ‘teachers, individually and collectively, will have a high degree of responsibility for their own development’ (Steyn, 2010, p. 214).

Criterion: authority and autonomy

Professionals are seen as experts in whom considerable authority is vested and professions are discernible by a large degree of self-governance. Professions exert substantial control over the curriculum, admission and accreditation of professional training schools, set and enforce behavioural and ethical standards of practitioners, and exert control over who their future colleagues are to be (Ingersoll & Perda, 2008).

Consecutive post-apartheid curriculum initiatives, i.e. Curriculum 2005, the Revised National Curriculum Statement and the Curriculum and Assessment Policy

Statement (CAPS) were all led by ‘experts’. Continued criticism against the progressive Outcomes Based Education approach and its revision led to the introduction of CAPS in July 2010. According to Msibi and Mchunu (2013, p. 25), CAPS was a ‘teacher-proof’ approach towards curriculum implementation reducing the work of teachers to ‘mere technicians’. De Clercq (2013, p. 47) similarly writes that teaching in South Africa has been ‘de-professionalised’, with ‘greater regulation and intensification of teachers’ work, and assumptions of a compliant teaching force that had to be tightly monitored’. Teachers are not even allowed to develop their own worksheets and the right to set their own examination papers (depending on whether or not a school is classified as a ‘targeted’ or ‘under-performing’ school).

Criterion: service orientation

According to De Vos et al. (2005) professionals are supposed to serve the interests of clients and the community and not, in the first instance, their own. It can be argued that a lack of service orientation among South African teachers is illustrated by numerous teacher strikes (Heystek & Lethoko, 2001), high rates of teacher absenteeism (Modisaotsile, 2012), and formal complaints lodged at the SACE against teachers for the misappropriation of school funds, fraud, theft, conduct unbecoming, and sexual abuse, including rape, of learners (SACE, 2013). When teachers strike or are absent from school without a valid reason, sexually abuse learners or enrich themselves at the cost of others, their interests become more important than the interest of their clients (learners and parents).

Criterion: professionals belong to a formal professional council

A profession restricts its practices to a professional group that projects a strong group consciousness, which gradually develops into a professional culture sustained by formal associations wielding strong power over members of the profession, and even over training departments or schools embedded at universities (De Vos et al., 2005). The SACE, a statutory council for the teaching profession, was established in terms of the South African Council for Educators Act (Act 31 of 2000). In terms of section 5(a) of the aforementioned act the Council has to promote, develop and maintain the professional image of the teaching profession (RSA, 2000). The establishment of the SACE can be seen as an effort to professionalise teaching in South Africa.

Criterion: a generally accepted code of ethics

A code of ethics is ‘a set of ethical principles that embody personal qualities and life-style habits that are expected of practitioners of the specific profession’ (Mosogo & Taunyane, 2009, p. 5). The SACE’s *Code of Professional Ethics* (2002) lays down rules regarding acceptable relations between teachers and the learners, colleagues, parents and SACE. According to SACE (2002, p. 151), adherence to the code of ethics is not optional and ‘any educator who breaches the Code is ... subject to the disciplinary powers and procedures’ of the Council. Since the first hearing of the disciplinary committee of the SACE in March 2002 until 31 March 2013 the SACE has received 3044 complaints against teachers, 339 hearings were held, resulting in 150 indefinite striking-offs and 113 other sanctions (SACE, 2013).

Criterion: competitive compensation

Professionals are usually well compensated and are provided with comparatively high salary and benefit levels throughout their working lives. The assumption is that given the lengthy training and the complexity of knowledge and skills required, comparatively high levels of compensation are necessary to recruit and retain accomplished and motivated individuals (Ingersoll & Perda, 2008). Salaries have, however, been a recurring complaint among South African teachers (Heystek & Lethoko, 2001; Mabaya, 2013). The need to investigate and perhaps adjust teachers' compensation was acknowledged by government in 2013. A presidential remuneration commission was set up to look at 'how public servants are rewarded, with the first phase focusing on educators' (Mabaya, 2013, p. 24).

Criterion: prestige

The professions are high status, high prestige occupations. They are respected and coveted. Research on the relative prestige of selected occupations finds that teaching is worldwide less prestigious than law, medicine and engineering, but more prestigious than most blue-collar jobs, such as truck drivers, and pink-collar workers, such as secretaries (Ingersoll & Perda, 2008). Heystek and Lethoko (2001, p. 223) find that teaching is held in low esteem in South Africa. Teachers are often the scapegoat for the crisis in South African schools (Steyn, 2010; Wilkinson, 2015).

Conclusion

Following the Structural-Functional Model of professionalism, this study has endeavoured to determine whether or not teaching is a profession in South Africa. The study has found that policies and structures are in place to enhance the professional status of teachers: the minimum point of entry into the profession is a four-year qualification. Ample opportunities have been created since the beginning of the new millennium to help un- and under-qualified teachers to obtain qualifications adhering to the REQV 13 benchmark. The 2011 *Minimum Requirements for Teacher Education Qualifications* specified requirements and guidelines for teacher qualifications and learning programmes to address the poor content and conceptual knowledge among teachers. The importance of mentoring, induction and CPTD are acknowledged by education authorities. The establishment of the SACE and the publication of the *Code of Professional Ethics* are important milestones on the road to professionalise teaching in South African.

Despite these important milestones in reclaiming and restoring teaching as a profession, there are still un- and under-qualified teachers, as well as teachers who lack subject and pedagogical knowledge in front of classes. Whereas mentoring and induction programmes are either lacking in some schools or informal and unplanned in other schools, CPTD is in its infancy. Curriculum development took away teachers' autonomy, reducing them to 'technicians'. The study has also found that South African teachers lack prestige and do not receive competitive compensation. The failure of teachers to restore the dignity of the profession is highlighted by a lack of service orientation by some teachers, despite a code of ethics that embodies the qualities of a professional teacher.

Reclaiming and restoring the status of the teaching profession in South Africa will not happen overnight. Policies and structures are in place. It is time for all 'great South African teachers' (Jansen, 2011, p. 1) to stand up, lead by example and reclaim and restore the dignity of this once proud profession.

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Initial and Continuing Professional Development of Adult Educators from an Educational - Policy Perspective: Rethinking from Croatia

Abstract

Notwithstanding the fact that adult education is accepted as an equal subsystem in all European countries, it is still characterised by a distinct level of differentiation in the approach and offer, and by a pronouncedly disorganised legislation, which may be seen in the heterogeneity of competences and qualifications expected from adult educators. To be able to professionally respond to the requirements and necessities of contemporary society, adult educators must continuously develop subject-professional, pedagogical-teaching and andragogical competences. Today, the majority of adult educators in Croatia do not have the basic andragogical knowledge and skills because of, among other things, insufficient opportunities for such an education. Starting from this assumption, in the first part of the paper we have described the impact of European policies for adult education on the national strategic and regulatory documents. The central part of the paper is dedicated to an overview of initial and continuing professional education of adult educators in Croatia. The final part of the paper consists of recommendations for the professionalisation of the adult education system.

Keywords: initial education, continuing professional development, adult educators, educational policy

Introduction

Adult education is a field that has been in the centre of interest of developed countries for the past decades. From a regulatory point of view, it is still the most disorganised part of the educational system, with the least resources and good policy will. At the same time, it is the part of the lifelong learning system with the longest duration, the largest heterogeneity of educational needs, the most diverse human potential and perhaps, the biggest expectations in terms of contribution to the development of a knowledge economy.

Every serious discussion on the quality improvement of adult education essentially deals with the question of professionalisation, i.e., an initial education and continuing professional development of adult educators (Buiskool et al, 2010; European Commission, 2007; Nijssen et al, 2008; Ovesni, 2011; Popović, 2010), which is primarily connected to the educational policy in a single country. The term *continuing professional development* is used in the paper to signify in-service training, while the term *professional development* encompasses the entire teacher education, i.e. pre-service and in-service training.

Considering that there is no unique educational path for adult educators, the entry requirements have a very diverse definition within European countries, and therefore it is difficult to determine the standards of the profession of adult education. With regard to this, Nijssen et al (2008) state that educating adult educators depends on the importance given to adult education, on the social and

professional position of adult educators and on the preconditions for their access to the profession.

Apart from an adequate initial education, adult educators are also expected to continuously upgrade their professional expertise, through a continuing professional development, which is important in order to improve the quality and efficiency of education, and to encourage educators' commitment to learning, responsibility, identity and professional satisfaction (Čepić et al, 2015).

Out of numerous professional development paradigms that have been developed in the past decades, the Competency-Based Approach and the Holistic or Reflective Approach are considered as the dominant ones (Creemers et al, 2013). The first approach is focused on teaching competences or standards that teachers must master, while the second one is focused on teaching practice reflection, experience and the development of values. Finally, it can be said that traditional models of continuing professional development are usually transmission-oriented and take place in the form of short workshops and seminars and are mostly organised on a one-time basis. On the other hand, the newest models normally occur over a longer period of time, within a particular context, in the form of practitioner inquiry, mentoring and study circles. Notwithstanding the model, the purpose of continuing professional development is, first of all, to be of benefit not only to teachers, but also to schools and students (Dawkins, 2011).

Professional development is a collaborative process that provides follow-up, implies continuity, individual and institutional responsibility, material and professional support, relevant sources, satisfying the needs of teachers and schools, social recognisability and credibility and differentiation regarding specific needs.

It is questionable as to what extent the professional development of adult educators really satisfies the stated criteria. Recent studies have shown that the initial education of adult educators in Europe ranges from an academic education to simply possessing work experience in a certain field and that the continuing professional development system is poorly developed. The lack of development is due to insufficient funding of adult education institutions for training, as well as the unattractive employment status of adult educators (Nijssen et al, 2008), which is undoubtedly also the case in Croatia.

This paper will give an overview of the current initial education and continuing professional development offers for adult educators, from an educational-policy perspective of the Republic of Croatia and the European educational area.

Reflections of current EU educational policies on the professional development of adult educators in Croatia

EU institutions dedicate significant attention to teachers' competences, therefore we can rightfully talk about a Europeanisation of teachers' education policy. In line with this, the challenges faced by teachers' initial education and continuing professional development are common to most European countries and are linked to the introduction of national competency standards and to the concept of teachers' lifelong education (Eötvös Loránd University, 2014). On the other hand, the location of governmental responsibility for adult education varies within EU member states, as does its legal status (Milana & Holford, 2014).

In their study's conclusion, Nijssen et al (2008) suggest that in many European countries there are no prescribed initial qualifications, formal requirements or structural measures to promote adult educators' training. The development of learning organisations and the creation of collaboration networks are hardly present in the area of European adult education, hence it may be concluded that continuing professional development is highly individualised and most frequently dependant on the employment status of adult educators. Čepić (2008) wrote about this topic emphasizing that nationally, the support of educators' professional development in an adult education institution involves the responsibility of each employee, but also of the entire management board, and can be achieved through the creation of learning organisations.

Even though the implementation of European educational policies mainly exists in the framework of the so called soft law, movements and changes in the adult education sector in Croatia (document production, adoption of principles, definition of priority areas and goal setting) are harmonised in time and content with the European policy on adult education (Council of the EU, 2011; MZOS, 2014).

The key actors for adult education nationally are the Ministry of Science, Education and Sports, passing laws and regulations and following their implementation, the Council for Adult Education, a professional and advisory body of the Croatian Government and the Agency for Vocational Education and Training and Adult Education, following and improving the work of adult education institutions.

According to the Agency for Vocational Education and Training and Adult Education data from 2015, in Croatia there are 569 adult education institutions, 10793 adult educators and 249775 attendees who, most frequently, enrol in professional training programmes (about 60%), secondary school programmes and pre-qualification (about 23%), as well as professional improvement programmes (about 9%).

Since 2007, the adult education activity in Croatia has been regulated by the *Adult Education Act*, according to which "adult education is based on the principles of professional and moral responsibility of adult educators and on the guarantee of the quality of the educational offer", while "the programme is carried out by teachers, professors, professional associates, lecturers, coaches, coordinators and others", who "must fulfil the conditions prescribed by the programme" and "have the right and obligation to professional and andragogical development" (Official Gazette 17/07, 107/07, 24/10). According to the same *Act*, the Agency for Vocational Education and Training and Adult Education is responsible for programmes of continuing andragogical professional development. The working norm for adult educators is defined in accordance with the regulations on educational activities (Official Gazette 17/08) and it represents one of the key forms of structural support for continuing professional development as teachers in Croatia, just as in most European countries, spend more than half of their time in classes, while the rest is utilised for other activities, among which is professional development. For beginners in the formal adult education system, a period of apprenticeship (12 months) is prescribed, during which the apprentice is being introduced to the work, followed by a license examination.

In a recent document regarding our educational policy, the *Strategy of Education, Science and Technology* from 2014, it is possible to see a prospect for the professionalisation of the system through the establishment and implementation of: (1) a lifelong professional development system, adult educators' licensing and qualification standards' development; (2) a programme for psychological, didactic-methodical, andragogical and additional education and training; and (3) projects that will precede the definition of a lifelong professional development system, adult educator licensing and qualification standards' development for adult educators (MZOS, 2014).

The European Public Policy harmonisation processes regarding the adult education sphere were additionally reinforced by the implementation of the Grundtvig and Erasmus+ programmes and with projects co-financed by the European Social Fund. In the context of the realisation of common European strategic goals, the current ESF project *Development of occupational standards and qualification standards for experts in adult education*, carried out by the Faculty of Humanities and Social Sciences in Split, holds a special place. The aim of the project is to strengthen adult educators' competences through the development of occupational and qualification standards and the preparation of a higher education curriculum for their education, while its foundation can be found in the mentioned *Strategy's* third measure.

The second important project being implemented with the European Commission's financial help is the project *Implementation of the European Agenda for Adult Learning*, carried out by the Ministry of Science, Education and Sport. Within the project's framework, the *Recommendations for the development of quality in the system of adult education and lifelong learning in the Republic of Croatia* (MZOS, 2015) were published as a result of the analysis of strategic documents, forums and a SWOT analysis of the system. Among the results concerning adult educators' competences, the following were mentioned: correspondence between the European and the national strategy, questionable quality of classes and educational programmes, insufficient competences of adult educators, the need to invest in professional development and find additional sources of financing, and to encourage staff mobility. Among the weaknesses of the adult educational system, the SWOT analysis has ranked the non existence of initial andragogical education as an entry requirement, and the fact that continuing professional development is not a condition for the employment of adult educators, which is something that the scientific community has already been pointing out for some time (Čepić, 2009; Kušić, Klapan & Vrclj, 2015).

Initial education and continuing professional development of adult educators in Croatia

One of the main goals of the interested adult education scientists and practitioners is the standardisation of competences and qualifications of adult educators.

In Croatia, educators employed in adult education are experts of different profiles with a degree in non-pedagogical studies or pedagogical studies. The majority of educators in Croatia (regardless of their starting qualifications) work part-time in adult education.

Based on the *Adult Education Act* (2007), teachers employed in formal education must possess subject-professional and pedagogical-teaching competences to work with children in elementary and secondary schools. For those working in non-formal adult education though, there are no regulated conditions, qualifications and competences. Absurdly, andragogical competences are not compulsory to work in the adult education system.

It must be emphasized that a degree in andragogy has never existed and still does not exist in Croatia. Currently there are courses aimed at the acquisition of andragogical competences in Croatian universities, but andragogy is still traditionally understood as a pedagogic discipline. In accordance with this, andragogy is a compulsory subject in the curriculum of pedagogy undergraduate, graduate and postgraduate degrees in Zagreb, Osijek, Split and Zadar. The only existing andragogy department in Croatia is at the Department of Pedagogy in Rijeka, where Andragogy and Adult Education and Local Development are carried out as compulsory courses, while Adult Education in the Conception of Lifelong Learning, Adult Teaching Models, Andragogy of Target Groups, Knowledge Economy and Business Environment are elective courses.

Although the mentioned national documents highlight insufficient competences of adult educators as a key challenge in adult education, it seems that the offer and continuity of professional development programmes is smaller than the actual demand. In Croatia, continuing professional development of adult educators is primarily carried out nationally, usually on a one-time basis, in the form of a workshop or conference, and generally focused on knowledge acquisition and attitude development. Given that these programmes do not represent a condition for employment, they are primarily the responsibility of individuals or institutions and generally not differentiated with regard to the specific needs of the length of service or institution.

A significant role in the implementation of continuing professional development programmes was held, and still is, by adult education associations, competent administrative bodies and adult education institutions. The Summer Andragogical School is an example of good practice which, apart from short closure periods, has existed since 1958. Besides the Summer Andragogical School, an important role is also held by the Winter Andragogical School. Both of them operate even today in the organisation of the Croatian Andragogical Society, under the name Andragogical Conference. Verified training and improvement programmes for gaining andragogical competences are also carried out by the Zvonimir Learning Institute in Zagreb.

A crucial adult education institution is the Agency for Vocational Education and Training and Adult Education. From 2009, the Agency has been periodically carrying out two free continuing professional development programmes, resulting from the CARDS 2004 programme: Andragogical Teaching Models (20 hours) and Andragogical Didactic Application (16 hours). Furthermore, occasionally it organises forums and seminars, and the International Andragogical Symposium since 2013. In 2016 the Agency is carrying out the second cycle of the free Curriculum globALE workshops. It is an internationally recognised educational programme for adult educators (660 hours).

Except from the sectorial, in this context, the role of the Agency for Mobility and EU Programmes and its Grundtvig and Erasmus+ programmes, cannot be

disregarded. For instance, from 2010 to 2012, Croatia has received 981.859 euros for the sector of adult education, while in 2010 and 2011, 92 individual mobilities were realized (available at: <http://hr.statisticsforall.eu/statistics-llp-grundtvig.php>). For most adult educators, these programmes represent a unique opportunity to participate in high quality international in-service trainings and mobilities.

Conclusions and recommendations

The current situation in Croatia suggests the need for a more comprehensive research of adult educators' needs. Based on research results, it would be possible to develop high quality continuing professional programmes by including different approaches, methods and models. In doing so, special attention should be paid to ensuring the continuity of professional development and launching long-term local programmes, aimed at developing the reflexivity of teachers.

In addition to legislation and strategic documents, appropriate infrastructure and financial support, a key role in the education of adult educators is covered by the assurance and development of quality on a systematic level. Croatia needs a university degree in andragogy, which could be carried out independently or combined with other study programmes. Furthermore, it is possible to introduce optional modules with andragogical content, even in degrees related to other profiles and develop specialised andragogical programmes offered in the framework of lifelong learning university programmes for additional education.

The development of andragogical competences should go from being a dominantly centralised model to being a part of regional strategies, which could contribute to the realisation of common socio-economic goals. This also implies the possibility of local funding for professional development.

The following key component is the support of the administration of adult education institutions to those participating in continuing professional development and promoting the importance of internal education in the institution. It is necessary to build networks that encourage and support horizontal learning, for instance professional learning communities, through which it would be possible to share knowledge and experience, encourage innovation and act as a stimulant.

Finally, in order to work with adults, we consider the introduction of regulations for continuing professional development as a particularly significant condition for practising the profession of adult education. This is necessary if we wish to achieve the desired changes.

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Educational Reform from the Perspective of the Student

Abstract

Educational policies are tools that the state prepares to generate conditions that allow access to and retention in schools, with the consequent reduction in school failure, increasing the external yield and fulfilling the expectations of the internal agents (teachers, students, school managers), external users (families, society, employers, industrialists) and the great expectations of the national project and the political pundits who see education as the panacea to all the evils and crises of nations.

Keywords: educational reform, educational policy, student, Mexico

Introduction

In the historical, social, economic and political context of Mexico over the last 50 years, the educational system has designed and implemented a series of strategies that include structural and organizational reforms, in order to modernise and to make the different levels of schooling more competitive. It has made significant changes in curricular design, educational development, educational management, and accessibility to and fairness in education, all for the sake of raising quality and continuous improvement in educational standards.

Nevertheless, to speak of education, as a field of study and work, is enormously complex and delicate. “Complex because of the number and diversity of factors, actors and functions that make it up, and delicate because of the powerful forces that intersect in it and the multiplicity of repercussions and consequences that their actions and outcomes generate in society” (Zorrilla, 2008, cited by Sandoval, 2010, p. 5). Similarly Rama (1997) notes that complexity is the principal characteristic of educational policy.

To be able to make sense of educational policies and reforms in a globalised and neoliberal world, in a world that displays great changes, and what existed a second ago no longer exists, where the hegemonic countries govern policies and reforms in the countries that depend on them economically, a world where we are in the hands of the students of today and the future, who will be the decision makers of tomorrow, to be able to understand the past, present and future changes in educational matters, it is important to define what policy is, and what educational reform is, from a range of methodological and epistemological theoretical positions.

Educational policy

Educational policies are shaped by the cultural, political, social and economic aspects of the countries where they are developed, because their dynamic and

structures are complex. Their fundamental purpose is controlling processes for educational institutions. Pineda (2011) defines policy as a permanent activity that consists of the continuous organization and dynamic of the educational system, directed to reinforcing the *status quo* or social order.

Navarro (2006) identifies two classes of educational policies. The first focuses on quantitative expansion and raising the rates of enrolment, and these policies are modified frequently and include a set of marginal policies. The second focuses on developing the quality and the efficiency of education, and includes a set of basic policies that are very rigid and resist all fundamental change. He also refers to four basic policies of educational systems in Latin America:

1. Public/private participation in the market.
2. Free public education at all levels.
3. Absolute stability in the employment of teachers, the rules on hiring, promotion and retirement, that are practically impossible to change.
4. The continuity of the national reach and, therefore, the power of negotiation of the teachers' unions.

For the formulation of educational policies, different social and political actors can be identified. Three groups of actors are crucial in decision making, and have complex preferences. By manipulating other, different, actors they effectively have the power of veto over policies. Other actors, in spite of being the end users of the system, take little or no part in the formulation of policy. In addition, there also exists one external actor who deserves special attention on account of its great influence, namely the Executive.

1. The Teachers' Union exerts a dominant influence when great changes are made, and frequently feels threatened by the reforms, not for the effect that it has on their professional activities, but for its sustainability and power as an organization, since its members are captive and feel controlled by the union that represents them; it creates teaching posts, it controls appointments, and it negotiates pay and benefits. This power keeps union members under control, and without active participation in the proposals for policies and reform. Since the leaders are self-appointed, and often for life, the union inclines in favour of the party in power, in order to negotiate and obtain benefits of political patronage, as they can rely on the support of the union membership. The unions only promote changes that have been demonstrated to work, and over centuries they have developed an attitude that this is how things are done here, and this is how they will be done. Therefore, it is possible to ask: where is the innovation, modernization, and educational change? Only in the rhetoric.

2. The Executive (mainly at the beginning of its term of office) where policies and reforms have their genesis in the groups of technocrats interested in modernization, as described in national projects or national plans of development. The main intention is to improve education as part of modernisation, improved efficiency and national development, in order to maintain global political stability. Reforms only take place in words, but not in actions. Similarly, a significant proportion of policies and reforms are not joined up, and change or lose continuity with each change of government. In his sense it can be seen that reforms are thought of as events (not processes). This type of reform does not entail systematization and evaluation, nor does it involve feedback as to whether it is effective or not, and

nobody is held accountable after the reform for its outcomes. In this way reforms lack challenge and careful evaluation.

3. Regional Politicians participate in the reforms and educational policies on a smaller scale, but with the purpose of obtaining political influence, obtaining votes, and improving the local economy in the context of an inter-jurisdictional competition. Here the account offered by Oszlak (2003, p. 28) fits: “The state bureaucracy, administrative widow of successive governments and political regimes, ends up becoming an immense cemetery of political projects”.

4. The Actors without Voice or Vote who include society, employers, industrialists, educational managers, teachers, parents and students.

5. The External Actors, who, in spite of being external, wield great power. These include organisations of international finance, particularly the World Bank and the Inter-American Development Bank, the United Nations Organisation for Education, Science and Culture, the Organization of American States, the Organization for Economic Cooperation and Development, and the International Labour Organisation, among others, have found a significant way to influence the formulation of policies and educational reforms. The proposals of international organisations incorporate a positivist and mechanical conception of education, with a dichotomizing mentality (good-bad; works-does not work; top-down). These reforms can be described as “black and white”. They also suggest uniform reforms, that conform to pre-established models and linear development, that are presented as absolute knowledge, but do not necessarily work in the prevailing local conditions. Such reforms may serve as a datum point, but all reform depends on its location in specific circumstances. They also only identify partial reforms, where there is no holistic vision and only one facet or educational level is privileged. Then there are also the quantitative reforms, which are only concerned with numbers, and quality is reduced to quantity and measured with a few indicators. And finally there are the reforms to be tested by teachers (Torres, 1999).

Educational reform

Perez (1999, p. 145) comments that an educational reform, “Affects a broad landscape and presupposes a fundamental intention to alter the extent and direction of education”.

Educational reform is the interventions of policies intended to lead from above, at the macro and system level, driven by states/ governments and the international organisations (Torres, 2000).

For Martinic (2000), the educational reforms are great social and communicative processes whose success is underwritten by the participation of all the involved actors.

Zaccagnini (2004, p. 21) states that: “Generally in education, one talks of reforms when one sees the need to orchestrate a change in the structural organization of the system; when one changes the curricular design and the consequent curriculum; when efforts are made to modernise the system as a whole, imposing one that is more agile and effective dynamically in terms of institutional operation; when decentralizing the central bureaucracy; when making efforts to raise the general quality of education, for the sake of improving academic yield of students and reducing school failure; when trying to adapt and fit the educational

development to the demands of the labour market; when one wants to introduce changes in the pedagogical style of teachers; when one seeks to transform the institutional culture of schools; when one seeks re-orientate the criteria for the organization and institutional management of schools, etc.”.

Types of reforms

Oszlak (1999) suggests that within the reformist movement there are “two generations”. The first focused on reorganising management, finance and access to the system. Here we find reforms for financial reasons, which tried to trim the expenses of operation and the burden on the national budget and reduce the total investment of public and private resources in education. The second generation addressed the problems that affect the quality and outcomes of educational processes. This generation proposed reforms for reasons of competitiveness, which are oriented to prepare the population so that they have human capital of greater quality, new competences and improve the economic competitiveness of the nation. There is also a third generation, starting in the twenty first century, which proposes a series of reforms focusing on the effectiveness of schools, recognising that schools are integrated in all kinds of external networks, as well as internal ones, and are engaged in a new type of relationship with the new technologies, among other characteristics. These reforms have the purpose of increasing social mobility and social levelling, so that the main thrust of these reforms is that they should promote fairness.

As a student perspective

When low school performance is in the students of different educational levels, it is assumed that the blame should fall on the heads of teachers of different educational institutions. However, it is difficult as the problems lie, for the most part with other external aspects, not teachers in the classroom. Not producing good results, if the vast majority of students from different schools have an open mind towards their school work is because students’ internal difficulties prevent them from giving due attention to what happens in their classrooms. In many cases the teachers responsible for the work directly in the classroom think the student is present in body and soul in their school chores, when the reality is completely different, which causes the overall performance in school groups to be very poor (Noriega, 2003).

Conclusions

National projects cannot isolate educational policies and reforms from the generation of jobs, social health, and public services. There is an interdependence between education and the economic, political and social sectors. Similarly education, qualifications and research comprise an integral whole, and as long as they are seen as segmented and separate it will be impossible to bring about important changes in education in a holistic way. In the educational context in Hispano-America, it is possible to identify sectoral reforms that have been developed with a partial vision of the national system, and these reforms are

formulated between the unions and the Ministry or Secretary of education. Such reforms attempt to change only what is internal to the school, and ignore the fact that education is not isolated. Such internally focused reforms look at matters of educational supplies, infrastructure, equipment, plans and training programmes, methods and techniques of teaching, texts, libraries, laboratories, educational qualifications, and the organization and internal management of schools, etc., but without a budget that facilitates autonomy in the handling of resources with transparency and accountability. So long as the reforms have this limited focus it is possible to ignore private education, and to concentrate on the presumption that it is only state education that needs reforming.

The long hoped for change to education will only take place when there is the political will to listen to the views of great thinkers in education the professors, the educational managers, the industrialists and employers, the teachers, and, most of all, the parents and students. It is important to remember the expression, “Vox populi, vox Dei”, and not to forget that, “Vision without action is a daydream”. To create a real national project it is necessary that the mission and the vision are created inside all the groups, that empowerment bears the fruit of fairness and improves social welfare. It is not sufficient to think that only the head thinks and the rest of the population merely obeys decisions taken by others at their writing-desks, without seeing the internal and external reality of the system. The wages and conditions of the union leaders, political representatives and technocrats give them access to the opportunity for a different quality of life and decontextualises their decisions from the social, economic and political environment that affect the life, education and work of the people who are on the receiving end of their educational policies and reforms. Everything is not so rosy; just because there is a plan on paper (a proposed reform document), it does not mean that it will be put into effect and achieve results. Reform-action goes forward, to innovate, to create, to re-invent, from the foundation, in reality, to grow as professionals with the work competences that are needed, as people with an integral and holistic development, as a group with commitment and political and social responsibility, as a nation with dynamic and competent processes at the international level.

Mexican society should pay more attention to the problems of students in general, since it is one of the ways in which teachers are in interaction with those directly involved in this immense responsibility to educate and pass culture to students. One of the main problems of Mexican society is precisely in the sense that parents are unconcerned about the education of children, thinking that just because they entrust their kids to some teachers, who then have direct influence on their children in the classroom, is more than enough as students are in the best position to learn what in their classroom is developing day by day, missing a more equitable interaction between teachers, students, tutors and parents (Noriega, 2003).

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Leadership and Context connectivity: Merging Two Forces for Sustainable School Improvement

Abstract

School improvement is admittedly the main business of school leadership. However, while there is agreement on the importance of school improvement, sustaining this improvement remains a challenge. The challenge seems to lie in the disconnection between the leader and the context in which the school operates. This chapter presents contextual intelligent leadership as a new type of leadership that can create a link between context and improvement to ensure sustainability.

Keywords: contextual intelligence, school improvement, leadership, student learning, sustainability

Introduction

It has now become a universally accepted fact that school leadership cannot be divorced from the context in which it operates. In other words, leadership cannot function in a vacuum, as Fiedler (1967) once observed. In the same manner, Bezzina and Vedoni (2006, p. 7) have remarked that for leadership to be meaningful to people's lives, it should be understood within a broader context. It is no wonder, therefore, that quite a significant number of studies across various disciplines present the common view that leadership is context-bound (Foley, 2013). In a randomly selected literature review on leadership and school improvement covering at least three decades (Bennie & Nanus, 1985; Hallinger, Bickman & Davis, 1996; Leithwood et al., 2006), the concept of *context* featured prominently to give a substantial grounding for the existence of a close connection between leadership and context. This leadership-context connectivity appears to underpin any theoretical and practical discourse on leadership, regardless of whether such a discourse is on leadership perspectives, functions or styles. For instance, the manifest shift in leadership research over the years from the classical leadership perspectives (Bass, 1985; Gorton, Alson & Snowden, 2007) to the contemporary leadership perspectives (Avolio, Walumbwa & Weber, 2009) illustrates sufficiently just how increasingly complex leadership has become over space and time – both of which define context. Just as leadership is recognised as complex and dynamic (Uhl-Bien, Marion & McKelvey, 2007), so is context (Reed & Swaminathan, 2014). The latter, as studied specifically in an organisation such as the school, is shaped by a combination of internal and external factors. Considering the unique nature of school leadership and context and the link between them, this chapter argues for a contextual intelligent school leadership. It begins with the assumption that the nature of the link between context and leadership *determines* sustainable school improvement to the conclusion that a *contextual intelligent school leadership* is critical for sustainable school improvement.

Theoretical grounding: Sternberg's Triarchic Theory of Human Intelligence

To understand how the connection between school leadership and context contributes to sustainable school improvement, reference is here made to the *Triarchic Theory of Human Intelligence*, rooted in psychology and popularised as Contextual Intelligence Theory by its proponents. Based on Sternberg's (1985) work, the theory presents contextual intelligence as 'the ability to influence anybody, in any place, at any time' (Kutz, 2015, p. 11). According to Sternberg (2005, p. 189), a successfully intelligent individual demonstrates the ability to set goals, capitalize on strengths to adapt to, shape and select environments through analytic, creative and practical abilities. Relating the theory to leadership, Kutz (2008, p. 5) presents contextual intelligence as the ability to 'recognize and diagnose the plethora of contextual factors' in a given situation and adjust one's behaviour to influence the situation. It includes the combined knowledge of technical skills and practical know-how. In the nutshell, *contextual intelligence* involves the application of common sense to a situation (Wagner, 1987). More intelligent individuals, according to the theory, have better chances of fitting into an environment than a less intelligent individual (Bray & Kehle, 2011), because they can relate to their environment through selection, adaptation, and reshaping (Sternberg, 2005). Of fundamental importance to learn from this theory is that the world is there and changing with the passage of time and how to react to or act upon the change is an individual's choice.

What shapes contemporary school context?

The world is changing and so is the context in which school and its leadership interact. This context is shaped by many internal and external factors which influence the leader's behaviour and to which the leader must adapt. Among dominant contextual factors with influence on students' learning and achievements are the school's climatic conditions *school safety, interpersonal relationships, teaching and organisational structure* (Bascia, 2014). External factors include *technological advances, socio-economic conditions, globalisation and accountability systems*.

Review of literature on context-leadership connectivity

There are as many various perspectives on school leadership as there are contexts from which such perspectives are drawn. However, the review of literature on school leadership and context show two recurrent themes, namely: a) leadership as context-bound process; and b) school context as complex and dynamic.

There is a symbiotic relationship between context and school leadership. While the school context influences leadership, leadership shapes the school context. For instance, while the situation in which leaders work influences their behaviour, approaches, practices and style (Bolden et al., 2003), school leaders restructure the context to develop followers (Keller, 2006). Their success in this regard depends on how context-responsive they are. For instance, Reed and Swaminathan (2014) have found that contextually responsive school leaders tend to use a multiplicity of

context-based best practices to solve complex problems, rather than relying on a single best practice.

As a subsystem of a broader education system, a school constitutes a complex and dynamic context (Uhl-Bin et al., 2007). Considering the various processes, people, structures, resources, objectives and activities involved within the school, its context is undeniably complex. Snyder (2013, p. 8) defines *the complex* as “a space of constant flux and unpredictability.” The dynamic nature of the school context derives from the fact that it involves a mix of interactions between people, their work (leading, teaching and learning), their actions (what they think, decide and do) and their environment (situation).

Why context matters for school leadership

The academic importance of context to school leadership can be presented in two prominent ways, namely, its influence on student learning and on leadership and teaching practice. These ways collectively provide a strong case for contextual intelligence.

Context influences student learning

There is a tight link between student learning and the conditions under which students learn. Schools as complex and dynamic organisations are perceived as having an influence on student learning and outcomes (Deakin Crick et al., 2013). Among dominant contextual factors with influence on students’ learning and achievements are the school climatic conditions such as *school safety, interpersonal relationships, teaching and organisational structures* (Bascia, 2014). Notable examples are: a) the existence of a positive relationship between learning outcomes and the physical environment in which teaching and learning take place (Bullock, 2007); b) students’ active engagement emerging from their perceptions of a supportive school environment (Wang & Eccles, 2013); and c) the influence of scheduling of instructional time on student learning and achievement (Marcotte & Hemelt, 2008).

Context influences practice (leadership and instruction)

The school’s context informs instructional and school leadership practices (Reed & Swaminathan, 2014). For example, while contextual variables tend to shape the principal’s instructional leadership in a school (Hallinger, Bickman & Davis, 1996), performance of people like teachers is enhanced by the work environment that builds their capacity and motivation (Day et al., 2011).

Sustaining school improvement through contextual intelligence

Sustainable school improvement is undeniably a challenging concept and its challenging nature can be described in two ways. First, there is no universally accepted definition of *school improvement* (Stinger, 2013). Its definition depends on context (place and time). Second, while many school leaders focus on improvement, sustaining such improvement is their main challenge (Muijs et al., 2004). A school may be seen as effective today but fail to move to the next level. This is because sustainability is a continuous process (Crowther, 2011), and not a once-off event.

These two main challenges are sufficient to make a strong case for a contextual intelligent school leadership.

Applying contextual intelligence to sustainable school improvement

Applying contextual intelligence theory in schools can best be described by referring to the theory of core leadership practices (Leithwood, 2006), which presents leadership as shaped by four main practices, namely, *setting direction*, *developing people*, *redesigning the organization* and *managing the instructions (teaching and learning) program*. These cross-contextual practices have implications for sustainable improvement.

Creating a sense of purpose

One of the core functions of school leadership is *to set direction* and to motivate people to accompany (rather than follow) the leader in following the direction. A contextually intelligent school leader understands that though today's school situation might be better than yesterday, the best possible situation still lies ahead and needs to be pursued by the entire school community. Equipped with this understanding, a contextually intelligent leader ensures that there is a collective ownership of what matters to move the school forward, namely, norms, beliefs, values, goals and vision and that there is a sense of shared moral purpose. A widely shared moral purpose, particularly when entrenched within a shared commitment to what the school cherishes, has the potential to move towards sustainability (Andrews & Lewis, 2004). A contextually intelligent leader encourages people to see the brighter future and creates a sense of urgency for everyone to shift from the present situation to the new one.

Developing people

It is a basic function of school leadership to develop people working in the school. This function aligns with the contextual intelligence theory in that for the school leaders to develop their staff members successfully, they need to possess an in-depth knowledge of their past conditions (experiences), their current situation (capabilities, attitudes, concerns and motivations) and their preferred future (high expectations). Such knowledge is an essential part of the infrastructure needed for building their collective capacity for sustainable improvement. Building capacity also involves empowerment and continued support for the entire staff – releasing their hidden energy to take risks in exploring and seeking innovative ways of improving student performance and achievement. Emphasis on collective capacity building stems from the fact that focusing on building the capacity of individual teachers, as research has found (DuFour & Marzano, 2011), does not improve schools. For capacity to generate improvement its scale needs to be widened to include everyone involved in the whole business of moving the school forward. Collective capacity building is linked to teachers' motivation and the situation in which they work. To strengthen the link between motivation, capacity and the working (teaching and learning) environment, developing positive and trusting relationship with the staff.

Focusing on the core business of schooling

There is now a general agreement that sustaining focus on the core business of schooling (teaching and learning) is the key function of school leadership (Robinson, 2010). Sustaining focus on this core business is enabled by the leader's sensitivity to the context in which the business is conducted. A contextually intelligent school leader studies the complex context in which the core business of schooling takes place and *acts smart*. Being smart means being sensitive to the context of change as it relates to the business and taking appropriate action. Such action involves continuously adjusting the key practices of instruction, learning and leadership to fit the situation and its dynamics.

Restructuring the organization

Successful school leaders reshape the conditions under which teaching and learning takes place (Day et al., 2011). This augers with the contextual intelligence theory according to which a person achieves success through a balanced approach to their environment. Such an approach involves preparing people for adaption to new contextual developments, *selecting* the best innovations the new developments offer to improve or *shape* the current school conditions (culture and climate).

Conclusion

Focusing on school improvement without sufficient consideration given to the link between leadership and context to ensure sustainability will not assist schools to succeed all the time. In this chapter a case for emphasising contextual leadership as providing the link between the school context and student learning is made. While school improvement and school context are important, connecting them in such a manner that they will ensure sustainability requires a new approach to school leadership, namely, contextual intelligent school leadership.

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Approaches to In-servicing Training of Teachers in Primary Schools in South Africa

Abstract

This paper focuses on the approaches used by school heads in helping their growth and their teachers in primary schools in Limpopo and Mpumalanga Provinces of South Africa. The Department of Basic Education expects school heads and teachers to bring change in their school performances. The problem is that in these primary schools heads and teachers' specialised knowledge is a problem. Interviews were conducted with school heads and some teachers completed a questionnaire. In the studied primary schools in-service training of teachers is done by teacher unions, School Management Teams, universities, through an Integrated Quality Management System and through donor assistance.

Keywords: school head/principal, teacher, pre-service, in-service, professional development, approach, instructional leader, strategic leadership

Introduction

Today's teachers' roles and accountabilities have changed, because of the way that students understand teachers, and the qualifications of the teaching-learning process itself have changed. Traditional teachers were always considered to be the source of knowledge and were expected to transfer that knowledge to their students (Gokalp, 2016). Preparing pre-service teachers to acquire classroom teaching competencies is one of the fundamental functions of education faculties. Teachers' professional development is a vital aspect to successful integration of novice teachers into classroom teaching. Dearth of professional development may possibly delay the smooth integration of the Internet into the curriculum. Some schools do not provide full access of computers to teachers (Ncube & Tshabalala, 2014). This paper seeks to understand how school heads and teachers are developed in the primary schools.

In the past teacher preparation programs have historically focused on management skills (e.g., scheduling, strategic leadership, and financing; which are necessary but insufficient for meeting the adaptive challenges leaders of all kinds face in today's world. Instead, programs need a more holistic focus, one that also comprises relational learning that is, a focus on building relationships), collaborative leadership, and reflective practice, and leaders must understand the nature of teachers, and their social-emotional dimension of leadership (Drago-Severson, Maslin-Ostrowski & Hoffman, 2012). Professional development in this context denotes to the principal when they update individual knowledge, skills, and application of new approaches and changes as well as improving their teachers' skills.

There is now strong evidence that teachers' views are formed during their previous education as students, and that these employ a powerful influence throughout their careers. Pre-service teachers' teaching experience is assumed to be scant. Factors influencing pre-service teachers' views about learning and teaching

differ, but the theoretical input received in the earlier years is the most influential factor of all (Debreli, 2016). Studies of pre-service teachers and teachers have highlighted the importance of teacher education program delivery and design and agree that university and school partners should work together and collaborate to improve learning for all including teachers, pre-service teachers (Livy, Vale & Herbert, 2016).

Method

A qualitative approach was used in exploring the in-service training approaches in primary schools. Data were collected by means of interviews and a questionnaire which comprised largely of close-ended questions and few open ended question. The researcher also collected the questionnaires in personally in order to maximize the rate of return of the instrument. Interviews were conducted with the heads of the primary schools.

In-service role of the head of the school

According to Redford (2015) competencies are classified as knowledge, skills and attitudes and they can be developed in the context of education and training. In brief the competencies are as follows:

- Specific knowledge (e.g. knowledge of the workings of the economy);
- Skills (e.g. planning, organization, analysis, communication, negotiation, working individually and in teams, risk assessment, capacity to identify opportunities for personal and professional/business activities); and
- Attitudes (e.g. sense of initiative, proactive, independence, motivation and a determination to meet objectives).

It is believed that for a school to achieve effectiveness and improvement in academic achievement, school leadership should no longer reside in a single person or certain administrators; it needs to be distributed among the major educational players across all levels. As instructional leader, the head is the critical point within the school to influence the quality of individual teacher instruction, and the height of students' achievement (Minadzi & Kankam, 2016). Insufficient resources and lack of a good relationship between the heads and their teachers are some of the problems impeding effectiveness of a school (Mzee, 2016). Irrespective of the type of the school and location, all teachers in the present time are expected to have knowledge, skills and attitude related to their profession and responsibility. For example, teachers must know different styles of learning including language, community and the cultural context of learning (Islam, 2016).

Collaborating with other teaching colleagues presents significant values for the professional development of primary teachers. These are the values of sharing knowledge, teaching skills, pedagogical methods and new techniques of assessment and solving problems with the help of experts, mentors, veteran teachers, educationists and professionals of inter discipline/profession and intra-discipline/professionals in other places rather than only in a school (Jumani, 2016). In the supervision of curriculum implementation due to lack of time to undertake supervisory duties head teachers can use the Management By Walking Around (MBWA) method to supervise their teachers. The idea of this practice is to listen

and respond to ideas and problems voiced and take effective action about them (Awiti, Onderi & Raburu, 2016). Approaches to teaching pre-service and in-service teachers must provide a contextualised experience, mediating the process with flexible guidelines to accommodate evolving issues (Alvarez, Kilbourn & Olson, 2016).

Leadership role of the head of the school

Head teachers can rely on applied transformational leadership in empowering teachers to fulfill their contractual duties, meet the needs of the school, and go beyond the 'call of duty' for the betterment of their schools (Santamaria & Santamaria, 2012). They must be able to inspire, motivate, and appeal to teachers through a range of skills and behaviors, which communicate their value to their schools. The benefits of this leadership style are that the leaders improve the bottom line, which occurs as employees regularly surpass expectations; morale is increased through leaders' efforts to fully integrate followers into the core functions of the institution. Transformational leadership has a moral imperative wherein leaders aim to destroy old ways of life to make way for new ways of life, while articulating vision and values to keep empowered followers on a unified path (Santamaria & Santamaria, 2012). These leaders redistribute power to their followers regardless of their philosophy.

Findings

This part will be looking at the role of the heads in their own development; their role in the development of teachers; and how they help struggling teachers.

Each of the school's findings will be presented verbatim and separately. The names of the primary schools used in this paper are fictitious to protect the identity of the participants. All the schools from Limpopo Province will begin with an **L** in the fictitious name and those from Mpumalanga province will begin with an **M**. I will start with the question then the responses from the heads of the schools.

Which workshops, courses or program did you participate in while you are a principal?

Lala Primary School: 'The leadership workshop. At University of Pretoria there was a module called "Lead and Manage People". I learnt that when you lead people you do not leave them behind you lead with them you do not leave them at a distance'.

Lonely Primary School: 'I involve donors'.

Loving Primary School: 'I got permission to download a book from the internet. Some teachers that are appointed permanently have weakness in teaching and this is where we come in to help them develop'.

Leading Primary School: 'After I attended the workshop on monitoring and assessing. This was for the department of education. We were taught to monitor the teachers and assess them'.

Livingstone Primary School: 'Every second year we have... in Limpopo, all the school management teams get together – also the SAOU gives a workshop – it's a

two day workshop... So the SMT members who are members of the SAOU get to go... All of them get together, yes... and it's usually a two-day workshop'.

Longlive Primary School: 'I must say that the SAOU (formerly an Afrikaans teachers association, lately an organisation with aims and functions more closely aligned with a teachers' union) – they do create a lot... they do create opportunities'.

Mahlangumgwezane Primary School: 'I involve the people in the teaching of learning of a learner and I also attended workshops'.

Mahamba Primary School: 'Quite a number of workshops. Courses that I think made an impact on me were courses on school leadership which I did through the University of South Africa'.

Mgwezane Primary School: 'I attended workshops, different workshops err for managers and leaders arranged by the Department of Education'.

Merry-go-round Primary School: 'I think it's still the same because I attended workshops on subjects that I am teaching'.

Motherland Primary School: 'Hmm I attended the management workshops, the curriculum workshops mostly also, the SGB Workshops, the school safety programmes, the school feeding programmes'.

Maphepha Primary School: 'While I was a principal I was trained as a trainer for SGB elections'.

Mjindini Primary School: 'Presently, there is a programme we are doing it with the University of the Free State called an ACE in School Management and Leadership'.

Mighty Primary School: 'Mmm, it was induction by the Department of Education, the district'.

What is your role in the development of teachers in your school?

Lala Primary School: 'Usually, the way I do things should set example for the teachers'.

Lonely Primary School: 'In terms of educator development we start from SMTs to teachers, I delegated duties to staff members in written form. I capacitated my teachers in not using corporal punishment. The SACE code of conduct must be adhered to'.

Loving Primary School: 'What we are doing now is that I do my own personal class visits I do not leave it to HODs only anymore because there was a time that I did it and I got complaints from the parents asking me to move their children from one class to the next'.

Leading Primary School: 'We sometimes call meetings with all teachers and we look at the performance of the learners according to subject performance'.

Livingstone Primary School: 'We are only 3; we develop and help each other'.

Longlive Primary School: 'I assist them by going into to their classes and see how they handle a class situation'.

Lalaphansi Primary School: 'I must make sure that I know them in the sense of their strong and their weak points... if I... I can't develop them and I can't be part of their development if I am not aware of areas in which they must be developed, so that for me is very important, and I am not doing that alone... the system of the school... the structure... the deputy principal, the heads of departments are all working together with that'.

Mahlangumgwezane Primary School: 'As a manager I have to see to it that my teachers are developed in so many areas like in teaching by inviting motivational speakers'.

Mahamba Primary School: 'I facilitate regarding issues that I detect to be a weaknesses. I requested officials to come and conduct a workshop on leave matters in 2012'.

Mgwezane Primary School: 'I help them using the IQMS'.

Merry-go-round Primary School: 'I make sure they attend workshops and training all the time. I always delegate them to do some of the office duties'.

Motherland Primary School: 'My role is to ensure that my teachers are developed, we have a programme here IQMS'.

Maphepha Primary School: 'I think it's very key because I... working with the SMT on managing the curriculum, when we review the performance review, we identify the challenges that teachers have. Then we organise in-service training for them'.

Mjindini Primary School: 'We encourage them to register (external intervention)'.

Mehlomadala Primary School: 'My role here is to mentor and to do coaching and motivation. I also do the delegation thing to develop them. I also invite the CIs to help the teachers'.

How do you help struggling teachers?

Lala Primary School: 'I will bring the teacher in my office and give him the policies. You see, at first you must provide the teacher with the tools to work with'.

Lonely Primary School: 'We assist each other especially when it comes to challenges'.

Loving Primary School: 'The teachers who have diploma unfortunately, most of us think that we know it all. I talk with the HOD and bring members of the SMTs when I do class visits'.

Leading Primary School: 'I ask an educator from another school to assist the teacher after teaching hours'.

Livingstone Primary School: 'Workload is too much. If one educator has to attend workshop it comes impossible to teach the learners'.

Longlive Primary School: 'The subject head to assist this specific teacher and also look at the subject meeting... help them with the subject meetings'.

Leeway Primary School: 'I can't find ways of helping them if I am not aware of the fields in which they are struggling, so after identifying that, making use of our system, our structures at our school – there's heads of departments, there's subject heads... so that's very practical'.

Mahlangumgwezane Primary School: 'I talk and try to assist them in their work. And however, if we cannot assist we involve the departmental officials'.

Mahamba Primary School: 'I through the SMT determine where they need improvement. I assign HOD's to administer the progress, and the turnaround strategies'.

Mgwezane Primary School: 'I have one on one session with them; I also advise them to go to other schools to get information if possible'.

Merry-go-round Primary School: 'I always encourage teachers to work, to assist each other, to do peer- teaching'.

Motherland Primary School: 'Through the class support visit'.

Maphepha Primary School: 'We develop a turnaround strategy for them and then through the HOD's and the departmental officials we help them'.

Mjindini Primary School: 'I call struggling teachers; I call them to the office and from there we discuss as to where does the issue lie and then she will indicate and then from there I'll ask whether she has enough resources for that particular subject'.

Mighty Primary School: 'We actually do peer coaching and then I ask for assistance from the CIs'.

Conclusion

Heads develop themselves through workshops, donors' involvement, Internet, IQMS, teacher unions, universities (UNISA, UFS and University of Pretoria). They develop teachers by setting example, delegation, mentoring, coaching and motivation, SMTs and HODs involvement, through workshops, IQMS, and motivational speakers. Teacher development strategies used by some Mpumalanga and Limpopo schools are individually guided staff development, observation/assessment and training strategies in developing their teachers. The inquiry and teacher involvement in a development/improvement process is not used in both the provinces.

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Social Justice and Capacity for Self-development in Educational Systems in European Union

Abstract

This paper explores social justice and equity in educational policies and systems in the European Union, and analyzes the significance within. Equity indicators of the European educational systems, *Equity of the European Educational Systems: A set of indicators* declared in 2006, introduces the debates on educational justice issues on one hand, and provides a reference framework for international comparison and educational policy-making on the other. In 2009, a strategic framework for European cooperation in education and training was agreed by member states of European Union lasting to 2020. Meanwhile, the European Council emphasized the objective of promoting social inclusion through the reduction of poverty and the need for quantification of education and social inclusion/poverty indicators. The target population is defined as the number of persons who are at risk-of-poverty, material deprivation and in jobless households. Educational equity, transcending the traditional idea of equality and combining the Justice Theories of Rawls and Sen, not only focus on the resource distribution in education content or processes, but also identify individual capability, willingness and effort and respect the diversity of career development.

Keywords: social justice, capacity for self-development, educational equity, educational systems, European Union

Introduction

Issues of equity, equality and justice are crucial topics for the study of education systems. Maiztegui-Oñate and Santibanez-Gruber (2008) point out that the concept of equity must include, and at the same time transcend, that of equality. And the concept of equity also includes that of social justice. While the principle of equality, promoting the same treatment for all, and the term 'equity' acknowledges the existence of unequal treatment in education process. They propose the different conceptions of equity that have been formulated recently in the debate on the school.

Equity and social cohesion are also important issues in the European Union (EU). In the report *Social Justice in the EU – A Cross-national Comparison*, Schraad-Tischler and Kroll (2014) find that countries in the EU vary considerably in their ability to create a truly inclusive society. 'Social justice' is a central constitutive element of the legitimacy and stability of any political community.

Government policies of redistribution function as an instrument of social justice and are conceived in terms of an investment rather than compensation. In this sense, social justice can be understood as a guiding principle for a participatory society that activates and enables its members. In education, the concept of equity is set as a core element in education policy and education systems.

This paper explores the idea and place of educational equity and social justice in the EU by analyzing a collection of relevant documents.

Equity indicators of the European educational systems

Declared in 2005, '*Equity of the European Educational Systems: A Set of Indicators*' was carried out as part of the Socrates 6.1.2. programme with the support of the European Commission, and is the result of collaboration between six European university teams. The report, with 8 principles and 29 indicators, is intended to measure and compare the equity of the education systems in the European Union Member States, and as an informative tool helps decision makers to redefine the educational politics.

The indicators are listed in four categories: (1) Context of inequalities in education; (2) Inequalities in the education process; (3) Inequalities in education; (4) Social and political effects of inequalities in education. Also there are five major principles of equality in terms of education, and the claims and the consequences of these various principles of justice. Five major principles of equality including: (A) libertarian positions, (B) equality of access or opportunities, (C) equality of treatment, (D) equality of achievement or academic success, (E) equality of social fulfillment or output (EGREES, 2005).

The indicators are intended to provide input to the debate on justice in education, by offering some elements of response to the following questions: (1) To what extent do individual educational inequalities have major social consequences for the individuals? What is the importance of those inequalities? Are they due mainly to the context, or rather to the process of the educational system? Are they used to help the disadvantaged? (2) What is the importance of educational inequalities between girls and boys or between groups of different social, economic or national origins? To what extent are they due to the societal context or rather due to the process of the educational system? To what extent are they aggravated by the society or the labour market? (3) To what extent does being below a minimum skill threshold have important consequences for the individuals in and outside the school context? What is the proportion of individuals who find themselves below that threshold? What proportion of each group is beneath that threshold? Is the fact of being below the threshold due mainly to the socio-economic context or rather to the educational system itself?

Equity systems in European education

In 2009, a strategic framework for European cooperation in education and training was agreed by member states of European Union lasting up to 2020. Meanwhile, the European Council emphasized the objective of promoting social inclusion through the reduction of poverty and the need for quantification of education and social inclusion/poverty indicators. The target population is defined as the number of persons who are at risk-of-poverty, material deprivation and those in jobless household (Münich, Plug, Psacharopoulos & Schlotter, 2012). This section will present the situation and systems of education equity in Europe.

Pre-primary education

Participation in high-quality pre-primary education has long-lasting benefits in terms of achievement and socialization during individuals' schooling and careers, because it facilitates later learning. Early intervention programmes, especially those

targeted at disadvantaged children can produce large positive socio-economic returns, and that these persist well into adulthood. Effects include better school achievement, grade retention, employment rates, earnings, crime prevention, family relationships and health. In order to offset disadvantage throughout the education system, pre-primary programmes need to be followed up with subsequent interventions, such as support for language learning and social adjustment, otherwise their beneficial effects tend to decay. A lack of investment in early learning, leads to substantially higher levels of remedial spending during later life stages. This is less cost-effective and can be linked with increased spending on crime, health, unemployment and other social policies (Commission of the European Communities, 2006). A number of European countries have introduced spending policies targeted at reinforcing early education and tackling disadvantage from the earliest age. The type of early childhood provision and the pedagogy to be used should be considered carefully. Programmes focusing on learning as well as personal and social competences tend to produce better outcomes and, consequently, greater knock-on effects throughout life.

Primary education

EU primary education focuses on quality basic education for all. Compulsory education and training systems should provide the basic education and key competences required by all to prosper in a knowledge-based society. This is especially important for some disadvantaged groups and where Member States are providing for a large number of migrants and ethnic minorities. Education systems with early selection of students exacerbate differences in educational attainment due to social background, and thereby lead to even more inequitable outcomes in student and school performance. Selection has been considered effective in some Member States, where whole schools are tailored to groups of students with similar needs and levels of achievement. However, the evidence brings this into question. Those European countries that select pupils at an early age display greater variation in pupil achievement than countries with more integrated school systems. Therefore, member states of the EU were informed that education and training systems which select pupils at an early age exacerbate the effect of socio-economic background on educational attainment and do not raise efficiency in the long run (Commission of the European Communities, 2006).

Secondary education

In secondary education, the Europe 2020 strategy highlights the completion of upper secondary education as the minimum level of educational attainment for young people in today's society. Indeed, one of the two education targets for the EU by 2020 is to reduce the rates of young people leaving education and training with no more than lower secondary education to below 10%. Early school leavers are more likely to have their life chances limited in today's society, as they lack the crucial qualifications needed for successful integration into the labour market and they are at greater risk of social exclusion and poverty. Early leavers from education and training are also more likely to find it difficult to participate in civic and democratic life. For these reasons, early school leaving may represent significant social and economic costs for society. The Council has recommended that Member

States should ensure that evidence-based comprehensive strategies to reduce early school leaving are in place. The recommended framework defines three areas of policy: prevention, intervention and compensation. Prevention policies include system-based and other reforms to remove obstacles to achievement and thus prevent early school leaving. Intervention policies are intended to avert problems for individuals, already showing signs that they may not complete their schooling; and compensation policies include the provision of ‘compensatory’ education – special programmes or customized support – for those returning to education after leaving early (Eurydice, 2013).

Higher education

Higher education is a key sector of a knowledge-based economy and society. As the Commission makes clear, the EU higher education sector faces numerous challenges and needs to be modernized if it is to become more competitive and promote excellence. One challenge is to create diversified systems which allow equitable participation for all, while remaining financially viable and playing their role more efficiently. There has been a steady growth in student numbers and a widening of the expectations placed upon European universities, but funding levels have not risen accordingly. At the same time, the expansion of student numbers has not increased equity, as it has mostly favored individuals from higher socio-economic groups or those whose parents attended higher education.

In order to bring about a more equitable balance between the costs funded by individuals and society and the benefits accrued by each, and to contribute to providing universities with the extra funding they need, many countries are turning to the main direct beneficiaries of higher education, the students, to invest in their own futures by paying tuition fees. Evidence also suggests that the market effects of tuition fees may improve the quality of teaching and management in universities, and reinforce student motivation. As a result of inequities earlier in the education cycle, pupils from disadvantaged backgrounds often do not achieve the level of qualifications needed to access higher education. Even those that do are often reluctant to consider going on to university. Policies to reinforce efficiency and equity of school systems are vital, along with action to change cultural perceptions of higher education. To this end, information about the opportunities and advantages afforded by higher education should be targeted at school pupils. Universities should be encouraged to develop comprehensive outreach and access policies, which could include the introduction of bridging programmes and earmarked places (Commission of the European Communities, 2006).

Theories and ideas of European educational equity

The ‘*Equity Indicators of the European Educational Systems*’ could be seen as a policy tool, enforcing educational equity and social justice. The construction of the indicators will be taken as the measure and comparison of equity in national educational systems, and as the reference framework of educational policy making both in EU level and in national level as well. The idea of equity has been the direction of the educational systems development and policy forming in the EU.

In the Indicators, EGREES (2005) points that: ‘equity is a more difficult concept than equality, and that it allows, in its principle, inequalities; nevertheless, it is a

concept that allows to go beyond a purely formal examination to perform a multidimensional analysis, ... A strictly egalitarian vision, which would aim to give everyone the same treatment, while ignoring the characteristics of each individual at the outset, or even, the results in terms of reproduction of the initial inequalities, would force us to question its very foundations, precisely for reasons of equality'. Therefore, the concern of diversity under the principle of equity could offset the neglect of individual original situation. It should be taken account of a multiplicity of principles of justice, assets connected with education or groups of individuals.

There are eight principles listing in the EGREES's Indicators to guide the formation and implementation with holistic and diversity (EGREES, 2005). In the first principle, it refers that indicators must enable discussion in the context of the various existing principles of justice, including: Utilitarianism, The responsibility theory, Justice theories of Rawls, Walzer and Sen. These theories are the framework of the column in the indicator. Among these theories, the focus that EGREES discusses is the difference and transition between the theories of Rawls and Sen. Rawls' theory represents a liberalist standpoint and was the basis for equality of educational opportunity. However, Sen's justice theory makes more mention about the equity of each individual's need. In the indicators, the application and integration of these two concepts of justice it could be observed that education systems and the subsequent change in education policy ideas move from equality to equity.

The justice concept of Rawls, equality is built on the idea of 'original position'. The 'Original position' is an imaginary equal situation that the 'justice' will be produced under the 'Veil of ignorance'. These ideas will decide a basic social apparatus for a real justice society. 'Principle of justice', according to Rawls, seeks the equality of distribution under a background institution that guarantee the equal liberty and the equality of certain general opportunities (Rawls, 2001).

The concept of 'equality of educational opportunity' is generated from the justice principle mentioned above. From this principle, 'the just equality of opportunities should first be checked, then we should make sure that the remaining inequalities are in favor of the most disadvantaged' (EGREES, 2005). According to Rawls' approach, it could be possible to consider that where countries are more or less equitable according to equality of opportunities, then within a group of countries similar in this aspect, the most equitable are those where the most educated offer their capacities to the service of the most disadvantaged (EGREES, 2005).

However, EGREES also recognizes that 'the only equality in education which almost everyone agrees with, the equality of opportunity is a hypothetical equality'. It should be concerned that: 'assuming that there is a distribution of natural assets, those who are at the same level of talent and ability, and have the same willingness to use them should have the same prospects of success, regardless of their initial place in the social system', 'it relies on concepts with questionable operability: talent, ability and even desire; how can they be measured or even assessed?' (EGREES, 2005).

Therefore, EGREES replenish the indicators with Sen's theory. According to Sen (2011), 'there is no external or internal factor which can counterbalance the injustice of the existence of such a population'. 'It should be checked that results and career inequalities originate in differences of will, efforts of the pupils, and not in inequalities of contexts or process' (EGREES, 2005).

In fact, Sen's theory of justice, based on the 'capability approach', is different to the 'distribution approach' of Rawls's theory. From Sen's perspective, the concept of educational opportunity offers more freedom for individuals pursuing our objectives. Then, the educational opportunity is not only concerned with the achievement of the 'culmination', but the choices or comprehensive opportunity of the educational process (Sen, 2011). This perspective is particularly concerned with correcting this focus on means rather than on the opportunity to fulfill ends and the substantive freedom to achieve those reasoned ends. The focus of the capability approach is thus not just on what a person actually ends up doing, but also on what he is in fact able to do, whether or not he chooses to make use of that opportunity (EGREES, 2005).

Conclusion

This paper describes the ideas of equity in the educational policy and educational systems of the European Union. Education and training systems play a critical role in the competitive development and social cohesion of the EU. Member states are recommended to consider both the principle of efficiency and the equity concept in education policy formulation. Students in levels of education systems are provided not only with equal education systems and environments, but also education for self-development capability. The idea of educational equity in European educational policy and systems transcends the traditional idea of equality and combines the Justice theory of Rawls and Sen, not only focusing on the resource distribution in education contents or processes, but also identifies individual capability, willingness and effort and respects the diversity of career development.

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Yu-Fei Liu

Social Justice and Capacity for Self-Development in Educational System in Japan

Abstract

This study is part of an integrated research project entitled '*Comparative Studies on Social Justice and the Capacity for Self-Development in Educational Systems*'. The purpose of this sub-project is to investigate how Japanese educational institutions realize social justice and enhance Japanese students' capacity for individual self-development. This is an historical investigation reliant upon the analysis of documents, field studies and in-depth interviews. However, because of the specific Japanese social and cultural background, the preliminary analysis of this study showed that although equal opportunity in education is often highly stressed and discussed, social justice is rarely used in their educational policies and researches.

Therefore, first of all, this paper will explore concepts of social justice and equality in education within the Japanese social and cultural background. Secondly, this paper will concentrate on the relationship between social justice (educational equality) and capacity for self-development in the educational system in Japan including the themes of early childhood education, elementary education, lower secondary education, upper secondary education, technical and vocational education, higher education, teacher education, disadvantaged schooling, new immigrants' education, and life-long learning. Finally, as a basis for comparative studies, this study will present Japanese ideas of realizing social justice and strategies for enhancing students' capacity for individual self-development.

Keywords: social justice, capacity for self-development, Japan, educational policy

Introduction

The study is a part of an integrated joint research project (3 years) financed by the Ministry of Science and Technology (MOST) in Taiwan entitled '*Comparative Studies on Social Justice and the Capacity for Self-Development in Educational Systems*'. This study (first year) will concentrate on the relationship between social justice (educational equality) and the capacity for self-development in the educational system in Japan including these 10 themes: early childhood education, elementary education, lower secondary education, upper secondary education, technical and vocational education, higher education, teacher education, disadvantaged schooling, new immigrants' education, life-long learning. Hence, it is an overview of the Japanese education system and particularly focuses on upper secondary education.

However, the question is why Japan? There are three reasons. The first one is Japan has a similar school system to Taiwan, for example, the 6-3-3-4-year system. The second one is the proportion of normal to vocational schools in upper secondary education is quite similar. The third one is that after 2000, almost at the same time, both Taiwan's and Japan's higher education entered the universal stage. According to a comparative study of the stages of higher education between Taiwan and Japan (Liu, 2014a), which was based on Martin Trow's 'Three Stage Theory' on the

development stages of higher education (Trow's conceptions of elite, mass and universal higher education, hereinafter referred to as Trow's theory) (Trow, 2007). This comparative study also shows that the enrollment rates of upper secondary education in both countries are extremely close to each other, and remain at the high level of over 90%. As Mei Kagawa, Hideyasu Kodama & Shinichi Aizawa (2014) stated the era of 'High-school-education-for-all' has arrived. Also both countries faced several issues such as Diploma Disease in recent years.

Based on these 3 reasons, we choose Japan as an object of research, and we believe that through the comparative analysis, Japan's strategies and implementations regarding social justice (educational equality) and capacity for self-development in educational system can serve as a reference for Taiwan's educational reforms.

The next question is why we want to talk about social justice and capacity for self-development in the educational system as well as focus on the upper secondary education? The reason is because the most important policy in Taiwan in recent years, called the 'Twelve-Year Basic Education Policy' (TYBEP), is implemented. Currently, the upper secondary education in Taiwan is about to enter a major change. After planning and designing TYBEP for 30 years, the Ministry of Education (MOE) in Taiwan finally officially announced in 2011 that the policy will be implemented in August 2014. TYBEP's original title is the Twelve-Year Compulsory Education Policy, but it is not compulsory education, in fact. TYBEP is a unified term, including the existing nine-year compulsory education and three years of the upper secondary education. In other words, TYBEP is just a 'quasi-compulsory policy of the upper secondary education' (Liu, 2014b).

Besides, TYBEP consists of 3 visions, 5 ideas, 6 objectives, and 7 divisions of 29 sub-policies (MOE, 2016). Hence, the content of TYBEP is too large and complex, making it difficult for the public to understand. Regarding social justice and capacity for self-development, one of TYBEP's visions is 'No Child Left Behind'; and one of its ideas is enhancing students' capacity for individual self-development. Moreover, social justice is just one of its objectives and based on these visions and ideas. The main sub-policies (approximately 95%) are about upper secondary education, such as introducing the school district system, reforms for the full exemption of entrance examinations, and narrowing the gap of school fees between public and private high schools. It shows that MOE not only aims to equalize the quality of education, but also ensure equal opportunity in upper secondary education.

However, in Japan, there is no such policy like TYBEP. Therefore, the purpose of this study is to investigate how Japanese educational institutions realize social justice and enhance Japanese students' capacity for individual self-development in the upper secondary education. This will be an historical investigation reliant on the analysis of documents, field studies and in-depth interviews. However, because of the specific Japanese special social and cultural background, the preliminary analysis of this study showed that although equal opportunity in education is often highly stressed and discussed, social justice is rarely used in their educational policies and researches. Therefore, first of all, this paper will explore concepts of social justice and equality in education within Japanese social and cultural backgrounds. Secondly, this paper will concentrate on the relationship between

social justice (educational equality) and capacity for self-development in the educational system in Japan including themes of early childhood education, elementary education, lower secondary education, upper secondary education, technical and vocational education, higher education, teacher education, disadvantaged schooling, new immigrants' education, and life-long learning. Finally, as a basis for comparative studies, this research will present Japanese ideas of realizing social justice and strategies of enhancing students' capacity for individual self-development.

Findings: social justice and capacity for self-development in educational system

First of all, this section will analyze the concepts and ideas of social justice and capacity for self-development in Japan.

Concepts of social justice and equality in education

As mentioned above, social justice is closely related to the capacity for self-development and Miyadera (2014) also maintained that:

'The cultivation of students' capacity for individual self-developments largely rely on the establishment of society with fairness and justice. Without social justice, students probably could not receive proper education result from their personal or family socio-economic factors. Then naturally their capacity for individual self-developments could not be nurtured.' (Miyadera, 2014).

However, although the Japanese know that social justice in education is very important, the preliminary analysis of this study showed that equal opportunity in education is often highly stressed and discussed. However, in contrast, social justice is rarely used in their educational policies and researches. On the other hand, because the Japanese Constitution sets forth the basic national educational policy, as follows: 'All people shall have the right to receive an *equal education corresponding to their ability*, as provided by law' (Article 26). There is also an obvious tendency for Japanese researchers to have passionate concerns about the interpretations of '*equal education*' and '*education corresponding to their ability*'. Hence, after World War II, in the history of the development of educational policies in Japan, a significant opposition between egalitarian (based on *equal education*) and meritocracy (based on *education corresponding to their ability*) existed, and resulted from the different interpretations of law. In particular, with the increasing enrollment rate of upper secondary schools, Okada (2013) pointed out that meritocracy, based on an Aristotelian distributive justice, was gradually considered as taboo in the Japanese one track school system where an egalitarian approach has been emphasized (Okada, 2013). In other words, do not directly use the term of social justice does not mean that Japanese researchers do not pay attention to this issue. According to the results of our interviews, it is probably because the Japanese special social and cultural background has led people to think it is not easy to achieve the highest value and idea of social justice, and so they tend to avoid the difficult controversy on social justice.

Therefore, according to Rawls's '*A Theory of Justice*', Miyadera (2014) criticized the Japanese government's directions of policies in terms of 'educational

justice'. He directly stated that after 2012, the Japanese government has been tending to not only ignore social justice, but also widen the gap between the rich and the poor. As indicated in the following, although there are some policies regarding the exemption of school fees and scholarships, the Japanese government's directions of market-oriented and competition-based policies as well as reforms of educational diversity indicate that the class divisions as well as the gap between urban and rural areas are connived. These directions and reforms of policies result in more diversification of upper secondary education, and may cause more unfairness and inequality in the educational system. Furthermore, this may lead to the reverse of development of educational egalitarianism intended to support the disadvantaged.

Besides, although the Japanese Constitution sets forth the basic national educational policy, as follows: 'All people shall have the right to receive an equal education *corresponding to their ability*, as provided by law' (Article 26), Hirota (2011) also pointed out that the 'ambiguity and arbitrariness' of the selective examination *based on student's ability* may result in the inequality of educational opportunity.

In summary, the issue of evading social justice in Japan must be resolved immediately, even though Japanese government also is eager to reform the issues of the gap between public and private high schools, such as the school fees, just like Taiwan.

Ideas of realizing social justice (educational equality) and strategies of enhancing students' capacity for individual self-development

This section will analyze how the Japanese government efforts towards achieving equal opportunity in education and students' capacity for individual self-development in recent years.

Reforms of the school system

In recent years, especially in 2014, the Japanese government (Education Reproduction Execution Conference, chaired by the Prime Minister Abe) has tried to reform the school system. Two prominent points are highlighted in those policies. The first one is positively reviewing the existing 6-3-3-4 school system and attempting to implement some pilot systems, such as 5-4-3-4 system, 5-3-4-4 system, and 4-4-4-4 system. The second one is emphasizing the connections among the stages of the school system. That is the, Japanese started to consider that the single school system of 6-3-3-4 is outdated and unable to meet the needs of all students. Moreover, they believe that diversity in the school system is necessary to provide more educational choices and achieve each student's equality of opportunity in education and capacity for individual self-development. Thus, 'the existing nature of bifurcate type' within the Japanese school system (Liu, 2013) and several reforms for the diversity of the school system, in fact, has led the Japanese-one-track system to be continually developed, which is completely different from the school system of the U.S.

Reforms of the school type

As mentioned above, in order to realize the diversity of upper secondary education, Japanese government not only attempted to change the school system, but

also continued to add new school types since 1999, such as the Cyu-Kou-Ikan School (i.e. Secondary School), which includes 3 years of lower secondary school and 3 years of upper secondary school. And after July 2014, the Japanese government started to promote the Syo-Cyu-Ikan School (i.e. Compulsory School), which includes 6 years of elementary school and 3 years of lower secondary school.

Promotion of the career education

In Japan, with the concept of life-long learning has been introduced and the importance of career education has continuously been emphasized by the government and educational institutes since 1990. Then, after July 2014, the Japanese government started to promote careers education further in the all stages of educational system, especially in upper secondary education. It also pointed out that upper secondary education, as a preparation to becoming a member of the society, should provide more challenging approach for all students who have the motivation to study (Cabinet Office of Government of Japan, 2014). At the same time, in higher education, the Japanese government has also begun to focus on the importance and necessity of the establishment of a vocational higher education system.

Promotion of narrowing the gap of school fees between public and private high schools

According to the Ministry of Education, Culture, Sports, Science and Technology (MEXT)'s White Paper 2013, one of its four basic directions is 'developing 'a safety net' for education', so the educational support for disadvantaged groups (such as youth, women, the elderly, the handicapped, etc.) and financial assistance for the economically disadvantaged (such as early childhood education grants, the exemption of high school fees, foreign senior high student grants, higher education scholarships loan and tuition remission, etc.) are positively valued and emphasized (MEXT, 2013).

Especially, in the upper secondary education, as mentioned above, in order to further guarantee students' educational opportunities from the influences of family socio-economic factors, since 2010, the Japanese government has implemented some policies regarding the exemption of public high school fees, and stressed the need for further promoting the school subsidy policy for those on low-incomes in 2014. Moreover, some local governments, such as Osaka Prefecture, has attempted to implement the exemption of private high school fees since 2010. Although the issue of evading social justice still exists, this movement of reforms, in fact, may help to achieve social justice in upper secondary education.

Conclusion

Because this study has just begun (since August 2015), there is no clear conclusion. So in this part, based on the discussions above, we propose the puzzles and future researches as follows:

Necessity of in-depth analysis of concepts of social justice and capacity for self-development in Japan

As maintained above, there is no such policy like TYBEP in Japan, and the preliminary analysis of this study showed that although equal opportunity in education is often highly stressed and discussed, social justice is rarely used in their educational policies and researches. Even the Chinese characters (Kanji) of social justice in both countries are the same. Therefore, the further research on the Japanese special social and cultural background as well as concepts of social justice and capacity for self-development in Japan are quite necessary. Especially, we need clear evidence and more relative researches to analyse the difference between social justice and educational equality, and the relationship between social justice (educational equality) and capacity for self-development in educational system. Besides, since the school systems of two countries are so similar, we believe that Japan's challenges and reform trends are a useful reference for Taiwan.

Necessity of comparative research in Taiwan and Japan

This research had proved that there were a lot of similarities in the educational system of Taiwan and Japan. Moreover, Taiwan and Japan are both valid comparison objects to each other in the very beginning. Taiwan and Japan not only have high systems entered the universal stage almost at the same time. Besides, they both faced several issues such as Diploma Disease. Therefore, further comparative research on social justice and capacity for self-development between Japan and Taiwan are quite necessary. This study also believes that the result of these future researches will be a good reference for Taiwan, Japan and even other countries.

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Emotions in Education Generated by Migration

Abstract

This paper presents the subject of school-age immigrants that have become part of the public agenda in México. This can be noted in the international undocumented immigration which creates a reorganization of the family bonds between parents and children; specifically, a physical and emotional vulnerability can appear with the absences, the problems and the conflicts that affect the family dynamic.

The object of this qualitative study is to explain the emotional vulnerability of the immigrants from Sauz, Hidalgo, Mexico. A questionnaire was used to determine the population's socio economic situation; as well as a semi structured interview. Some of the couple's results are: sadness, rage, and fear as recurring emotions associated with the uncertainty of their marriage relationship, besides this reality being visible, the impact of the downsizing of family income is also shown.

Keywords: migration, emotion, consignment

Introduction

The present paper displays in a short way some of the results of the qualitative investigation into emotional distress in couples and children of international immigrants in a community of the region of Valle del Mezquital, Hidalgo, México which shows a high percentage of migration and exclusion. Since migration is a multidimensional social phenomenon because of the variety of economic, political, cultural, historical implications and of subjects involved, it cannot bypass the social and emotional state caused in couples and children that stay in their place of origin and experience a variety of misfortunes when the husband or father is the migrant.

The categories of analysis of this study are the migrant condition of the family members and the emotional discomfort. The fieldwork was fulfilled through the use of an auxiliary questionnaire which had the purpose to gather information about the life conditions of the people from Sauz. The results were extremely useful to distinguish the population and to explain the growing migration. In this sense, the investigation was less concerned for the data accumulation and more concerned about the production of knowledge, emotions and explanations starting from the analysis categories; migration and emotional discomfort which were constructed during the course of the investigation.

During the last few years, the migration of Mexicans and Central Americans has been an emergent subject in social sciences because of the variety of the social, economic, political and demographic implications. Recent researches (Aresti, 2010) analyze the migrants' experience when crossing the Mexican borders, the detentions and the violation of their human rights, migrant authority abuse and organized crime. Other researches (López & Loaiza, 2009) address deeper the subject including the work exploitation and the work risks with the immigrants experience at the American border.

In health matters, the risk situations of the undocumented working immigrants have been investigated, and they are the ones who are forced to work and are excluded from the social services that a common citizen can enjoy. Other factors that affect education for immigrants are the differences in language and culture that reflect the norms and rules set by the destined place for living, also, in rural populations where the family income is not enough even though money is being sent, immigrant's wives have to do different chores in and outside of the household; like taking care of the school requirements for the children, managing and administering the low income and doing daily household chores.

As a social phenomenon, migration has a multidimensional character which requires an interdisciplinary research expectation that integrates different disciplinary points of view to understand it in greater depth. Whoever decides to migrate: father, mother, wife, son, daughter, sister or brother, uncle or grandson, will cause an emotional distress inside the family group, which will vary between the members of the group because of the meaning of the affective bonds that each person holds with the person who decided to leave. In some cases when the feeling of abandonment is strong and the emotion cannot be expressed it can lead to disorders. An important constant or variable in a large group of families in Mexico is their poor conditions of living, along with different problems and conflicts that deteriorate the bonds between family members and the family integration. For this reason, they look at the migration of a family member as a survival strategy.

Discussion and analysis

The living conditions of migrant families are helped by money remittances; however, it has been found in some cases that the amounts are insufficient and only satisfy the most immediate necessities like proper alimentation. In other family's stories, the migrant does not send the family money which leads us to another analysis sphere in which one person in the relationship holds all of the power and money plays an outstanding role.

In the family sphere this sending of money supplies for immediate needs and aspirations, there is an availability of resources, and it apparently prevents the frustrations and the emotional distress. In the management of the money different conflicts are found referring to how the income is administered and distributed between the family members. These kind of situations are seen the least, and maybe this is the reason why they are not inside the academic and public policy analysis, but they turn out to be an important subject when it comes to understanding how the power is held.

In this way we can observe that not all of the migrants' families are lucky enough to be helped out by the money being sent, in some cases this economic support simply stopped coming or the quantity was reduced. Therefore, the economic situation makes the family's emotional discomfort even worse and a variety of problems emerge, even the family's disintegration.

In a migration the family, the migrants modify their lives, there is a process that involves getting used to a new reality that withholds meaningful emotional costs which create implications in the intersubjective relationships between the family members.

In the raising of children the role of the economic provider is not enough, in migrant and non-immigrant parents the complete absence or semi-presence modifies the socialization and identity processes within infants. On the other hand, the physical absence of the husband or father could mean there is not a greater amount of freedom to decide things in the family. Some roles marked by tradition are kept; despite the distance the immigrant still makes the decisions concerning family projects, the management of the income and the children's education given by the mother among others. This creates daily tensions and the mother becomes the figure with greater responsibilities and chores in and out of the household, when traditionally all of this was assumed by the family man.

Besides, the children's emotional effects because of the parents' migration have been poorly studied. Some authors (López & Loaiza, 2009) consider there is very little documentation concerning absent parenthood or distance parenthood; other authors (Medecigo, 2008) consider the migration of parents as a social phenomenon that infringes the children's capabilities and relationships because they grow up without the physical and daily presence of the father; the affective bonds and the meaning of an authority are vital elements for the social harmony and emotional stability inside the family environment. However, it also allows the children that stay in the place of origin, if their living conditions are good enough, to develop, at an early age, greater responsibility, self-sufficiency and a bigger level of comprehension as of why his/her parent is absent.

Each family has a cultural heritage regarding the parental authority permeated by the dominant cultural values, in every single one of them the ways of a relationship and of cohabitation are important. There are even cases in which the mother has assumed this role for a very long time being head of the house and in charge of the children so that when the migrant father returns, his authority is not recognized.

The family's economic situation is unquestionable because it determines the type of ties and the degree of dependency that the rest of the family holds with the immigrant; the money remittances play an important role in this interweaving of affective relationships and the acceptance or non-acceptance of the family's care and concerns. Here it is worth mentioning the effort of the immigrant parents with the sending of remittances so that their children can have education opportunities in a high school and at college level. Few young people in the Sauz community have been able to use it for their professional careers; only two cases have led to the creation of self-supporting projects for their community.

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Part 4

Higher Education, Lifelong Learning & Social Inclusion

Everard Weber

An Ambivalent Community: International African Students in Residence at a South African University

Abstract

This is a qualitative case study of the experiences and perceptions of South African and especially international, African students living in university residences in South Africa. The concept, community, is used to interpret interview data. This community was characterised by ambivalent social relations: There was discrimination by South Africans against their fellow Africans and a problematic institutional environment in which the internationals studied. Nevertheless, international students identified with the academic mission of the university and its goals of participating in the global knowledge economy.

Keywords: community, social relations, African students at a South African university

Introduction

Socio-cultural change is theorised about in the literature on globalisation and the internationalisation of higher education. However, there is a dearth of empirical studies on changing social relations at African universities. A manifestation of the internationalisation of higher education is cross-border student mobility. In South African, as has been the case globally, student mobility has transformed the demographics of university populations. I wish to explore how diverse social relations in respect of nationality are evolving in these circumstances at one tertiary institution.

The postgraduate residence community

Community studies date back at least to the First World War. Two interrelated themes are evident in the evolution of this scholarship: debates about how to conceptualise and define the field and the meaning of community and, methodologically, questions arising from the variety of ways in which to study communities. These problems have changed over time. Crow and Mah (2012) have reviewed conceptualisations of community arguing it is a contested concept. Their discussion is based on 100 publications since 2000. They focus on 4 themes around which future research might be structured: “connection, difference, boundaries and development”. I shall work with the first 3 in this paper. Connection relates to the social linkages between individuals and groups and includes “disconnection” and

conflict. Diversity relates to living with and “celebrating” cultural difference, and includes social exclusion. Boundaries are associated with connection and diversity between different community types and their relations with one another. Different boundaries can be theorised and researched depending on the particular community. Boundaries can be entrenched, and can be crossed. Development is used in the sense of policy change and social and community development in areas such as health. I have operationalised the inter-relatedness of Crow and Mah’s (2012) conceptualisation by discussing connection, boundaries and diversity together, as one interlocking framework in the analyses below.

Methods

This study was conducted at one of the 25 public universities in South Africa. It is based upon qualitative, semi-structured interviews with 51 postgraduate students at the three residences that housed the largest numbers of international students. These students were male and female, and came from South Africa and other countries in Africa. Respondents were selected at random, although I was mindful of representativeness in terms of gender, wished to speak to students from different countries, and wished to obtain a wide a range of experiences and views. I have tried to capture the variation of individual experiences, as well as the interviewees’ common, group understandings.

I define community spatially and in terms of the locality of the three residences which are viewed as comprising a single case. Additionally, community is situated in the context of the paucity of research on changing relations of diversity in African higher education. Specifically, community is viewed as African students’ perceptions and experiences of living and studying at a South African university. I focus on social relations between the locals and the internationals, thus defining community also as diversity in respect of nationality.

Students’ understandings of community

Several interviewees who were critical of their experiences at the university, nevertheless spoke about the residence positively, in the sense of social and community “connectedness”. One student offered an ambivalent definition of what community means: problematically “sharing” and “learn[ing] from one another”, despite the boundaries of difference and encountering “problems” one had “to solve” when interacting with the Other.

Engagements with people who were culturally different were tied to the values and ethos the residence promoted: “mutual respect, co-existence... appreciating diversity”. Hardly anyone was critical of these formal policies. There appeared to be endorsement of what the university management wished to achieve. However, the point was made that around a third of the students attended the house meetings regularly organised at each residence. This was seen as an indicator of the absence of community and the expression of “individualism” where you went about your own business, and minded your own business. “I’m just here to study, and leave, I don’t want to mingle with anyone”. The residence was not a community because students were not “concerned” about “the next person’s well-being”. “[The building]

looks like a prison to me... sometimes you don't talk to someone for days; nobody will come knocking at your door. So that community thing is not there..."

Community was furthermore defined spatially in terms of the social engagements that occurred at common meeting places – the kitchen, the common room which had a television, the laundry room everyone used. "It's a very *functional space* where you *operate* from... you do not have a *social connection*... (emphases added)". One residence consisted of individual houses clustered in a common space. In each house there lived eight people who shared two bathrooms, two toilets, two showers and one "big" kitchen. "Communal relations [are] enhanced in that... when it's cooking time, you'll find at least two people in the kitchen... there's engagement about the social, the political [etc.]..."

Defining the residence-community spatially without social associations (such as its "communal nature"), can be compared to defining it a-culturally and a-politically. It was merely a place "where I go every evening". This student said that students had access to "all the basic things" and infrastructural amenities they needed. This "makes it a home". Another student described it as "secure", possibly comparing it to the crime in the surrounding town in which the residence was situated.

The university was a hostile, lonely place. People were alienated from one another. A student said it was particularly oppressive during the Easter recess because many students at the residences left and the campus was deserted. It was easier and cheaper for the locals to leave for their homes than it was for the internationals. Then there were the demands of postgraduate study which kept students busy. They moved between the computers in the library or the laboratories, and the computers in their bedrooms.

The absence of community was sometimes mitigated by its presence. References were made to the excursions and social gatherings that were arranged. These were few and far between and the general view was that more of them "to bring people together" should be arranged. Students also participated in sport, religious activities, and formed societies, mostly by nationality. One student referred to the religious community to which she belonged as the "fellowship".

The residences were also viewed politically in regard to their governance. Each residence had an elected "house committee" and was headed by an academic who lived on the site and who reported to the university management. Overall students approved of the work of house committees, but acknowledged that power was exercised top-down by university officials. One student complained that grievances were ignored and that "people are just scared to voice" them. A common complaint was that they were treated like undergraduates who lived in residence. Thus there were too many rules, some of which were inappropriately applied to adults. While the university management was viewed in a positive light and its efforts to serve students appreciated, there were practices that were criticized: There were the "ridiculous" cases of fifty year olds having to request permission for husbands to sleep over.

In sum residence communities were perceived and experienced as both hostile and as "communal" sites with which students identified. The presence and absence of community, of "connection" and "disconnection", contextualised social, political and inter-personal relations. A few students defined community narrowly as a physical place that had a given infrastructure and architecture, while others

remarked on its social features. Some students spoke about its internal politics and grievances as part and parcel of the community culture. The presence and absence of community contextualised social, political and inter-personal relations which I shall now discuss.

Discordant social relations

For a few students, social relations between South African and international, African students were fine: "... we're just a happy family, really". It was noticeable that those who did not think these relations were problematic were often South Africans. The perception that "we're just a happy family" could be related to the fact that many of the encounters between the internationals and indigenes were superficial. People met one another in corridors, they smiled, and they said, "Hi". This could recur week after week, month after month, and year after year. "People all greet, you say, 'Hi, Hi', you meet somebody, you shake hands, and so on. But people don't really mix freely". And one day you graduated and returned home without ever having established any social or personal intimacy.

For most of the respondents, social relations between South African and African students were fraught with tension. "They [South African students] look at other international students as if they came to grab their work, grab their chances". Relations were "very poor", "there's a big, big problem", "... as soon as they see that you don't sound like them, your accent is foreign they look at you weird". A distinction was made between African students who came from other southern African countries for whom there was greater acceptance among the locals, and those who came from countries further to the North like Nigeria and Tanzania. There was also a racial dimension: "If you come from Europe [it] is okay [laughing], if you come from Kenya and Tanzania there's a problem". A Namibian student said that because she was dark-skinned, South African blacks, when they met her would remark, "'So you're from Ghana'... maybe they have the perception that you don't have to be *that* dark-skinned... (emphasis added)". "Like [you're from] up there...".

One interviewee said:

... when they [black South African students] see you as a foreigner, the first thing they ask you is, "Why are you here, why have you not studied in your own country, why South Africa?" That's the question, not one, not two, not three [I have heard it] many [times].

According to a Namibian student there was a considerable degree of separation by nationality at the residences. If there were two girls, one from Namibia and one from Angola she would "... go and look for the Namibian one, and chill with her, hang out with her, but not with the Angolan one... People stick to their own...". It was common to form international societies by nationality. At social events diverse nationalities could be observed grouped together, separated from one another. Relationships among international students were not always conflict-free: "Yes, I don't get along that well with my Muslim roommate, because you know, they're praying in the middle of the night, making a noise". However, the common experience of being discriminated against by South Africans and the fact that they were all in a foreign country drew international students together and relations between international students who came from different countries were described as more cordial than relations between international students and South Africans.

There was a “subjective” “feeling” of being discriminated against when one met and engaged with South Africans. The discrimination referred to was not the kind of thing that one could prove empirically, say in a court of law. It was similar to the findings of a government-commissioned report (Department of Education, 2008) in regard to racism and sexism on South African campuses which were described as “covert” and “subtle”. Sometimes respondents were not sure whether it had occurred at all. It’s most common expression in this study was in questioning international students about why they came to study in South Africa, whether there were universities in their own countries, and what their long term plans were. Suspicion and distrust permeated such enquiries.

A scholarly community

According to Munene (2003, p. 117) the history of African higher education illustrates that student activism has “permeated the entire spectrum of the continent’s education”. African students have often protested against social injustice from a left-wing ideological perspective. Marxist-Leninist ideas have developed in countries like Kenya, Tanzania and Zambia. Munene argues that student activism has enjoyed a social acceptance and legitimacy in Africa that is greater than compared with the West. African students have defended their own interests, opposing attempts to reduce or do away with benefits such as subsidized housing. This has complemented critiques of the roles played by international agencies in African underdevelopment.

Discussing higher education in Africa as a site of political resistance by students raises critical issues in regard to how we conceptualise globalisation. Escobar (2004), Torres (2002), Burbules and Torres (2000, p. 18) draw our attention to thinking about globalisation in terms of the opposition to it and speak about “*counterglobalization*” and “*antiglobalization*”.

What is striking about the data I collected is that the great majority of the interviewees were not concerned with political activism. There were preoccupied with their studies.

... we have a couple of other Cameroonian students at the residence whom you hardly ever meet... because they are always really busy with their studies, its either they tell you they have a deadline to submit an article or they are doing some research on something... I mean they are always just busy... to most students it is all about research, research, research. So that makes some people completely cut off from social lives...

Curricula and pedagogies were not questioned or criticized. These were assumed to be objective and politically neutral. One learned so much at the institution that one genuflected in awe of its scholarship. Most of the African postgraduate students were progressing well academically, probably better than their South African peers and a further basis for competition and conflict. When asked whether there were any advantages in studying at this particular university, the typical reply was that there were many: good physical infrastructure, libraries, access to journals, quality supervision by competent academic staff of dissertations and theses. These were much better than in their home countries, it was said. The university’s reputation in particular fields was well-known in other countries. Its

academic mission resonated strongly with the academic goals of its postgraduate, African international students.

Under globalisation the role of higher education in the production and transmission of knowledge has become a driver of economic growth. Knowledge has become an international good which companies can trade across national boundaries. With the assistance of revolutionised communication and technology, it can move faster than capital and people. The “knowledge economy” is global in scope and operation (Varghese, 2008). Higher education has expanded at greater rates than other economic sectors. Demand for it has grown; its “massification” is well-known. It has provided opportunities for investment and profitability. The production of goods and services has become dependent on the production and application of knowledge. Both are market-led. Governments and universities administrators have tried to put in place policy frameworks and teaching and learning programmes to attract foreign students to local universities. The General Agreement on Trade and Services has promoted the development of competitive higher education systems, sometimes in partnership with the private sector, as market-friendly and as a tradable commodity (Olssen & Peters, 2005). Knowledge and information in this technically-rationalist, instrumentalist, quantifiable sense (Blankley & Booyens, 2010) has little in common with knowledge as integral to social critique and political activism, or the knowledges the humanities have traditionally sought to create (Sabour, 2005).

Conclusion

The students lived in a complex, ambivalent community. Opposing perceptions and experiences were intertwined. The conceptualisations of community in the academic literature capture these contradictions and equivocations well. The international students were discriminated against by their South African peers. The institutional culture at the university and at the residence was alienating. Oppressive experiences of diversity by national origin were understood, but tolerated by the interviewees. Opposition to them had hitherto not occurred publically. An important reason for this is that the students identified with the academic mission of the university, in the context of globalisation and internationalisation. They formed a community spatially and territorially, but crucially also, as the scholarly writing says, by “interest”. They were privileged because their postgraduate education would enable them, if it had not done so already, to join and compete with others in the international economy. This facilitated the pursuit of personal, as opposed to activist goals. Almost all these students were keen to complete their degrees. They can in a sense be said to be complicit in their discrimination and the reproduction of its social relations. The other side of the coin is that they have the potential for social action, against the background of mass student protests recently across South Africa. People, most especially in the age of globalisation, do not have fixed social identities. Students’ political silence as a group did not imply they had uncritically embraced the community which they had created and which had been created for them. Future research might examine the trajectories and forms of these changes.

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Internationalization of Higher Education Institutions in Latvia and Turkey: Its Management and Development during the Last Decade

Abstract

This paper aims at examining internationalization in higher education in two countries: Latvia and Turkey. The analysis is based on three dimensions of internationalization: institutional, organizational, and educational. Recently, under the influence of global processes, the internationalization takes form through the perspectives of three ideologies: idealism, instrumentalism, and educationalism. Institutional internationalization in both countries is mainly based on Bologna Process in European perspective. In other words, Bologna Process is to employ education for other purposes than education, that is, European identity. It is therefore that internationalization of higher education in both countries refers to the ideology of instrumentalism, as in many other member countries. This study reveals that both countries need a strategic planning of internationalization that also responds their own needs, while the countries are not alike in details. It may be predicted that many other member states are in the same position. Therefore, the comparative analysis points to the need for bilateral working bodies in exchange of experience and knowledge in order to develop a better understanding of internationalization for both individual states and for Bologna Process as a whole. Such studies can be done by academics as a complementary to the work of governing bodies.

Keywords: internationalization, Erasmus, instrumentalism, institution, academic exchange, student exchange

Introduction: Meanings of internationalization in higher education

This paper is to discuss internationalization in higher education in the context of two countries taking part in Erasmus Program. The discussion will focus on three dimensions of internationalization: institutional, organizational, and educational. Institutional dimension in this paper refers to the activities of the governing bodies in both countries. Organizational dimension informs how the members of the academic staff respond to the institutional dimensions, in the sense of mobility. And thirdly, student mobility will be considered. Both countries will be examined in their perspective of their internationalization practice in regard to the programs developed, or under development. The countries are chosen only because of the author's experience in them, as a Turkish citizen grown up in her home country, and as a PhD student at the University of Latvia. The need for comparison is based on the idea that data comparing all the countries, provided by European Commission and Bologna Process, are very much helpful, but too general to focus on details and challenges that fewer countries confront. Such comparisons can be helpful for developing bilateral cooperation and mutual exchange of experience that may contribute to the other. Rather than depending on unidirectional relationship between the central governing bodies of each member state, mutual relations between member states may help improve Bologna Process as a whole. In addition, Bologna Process may not be the only program that states follow. Member states may

be in pursuit of other ways, as is the case with Latvia and Turkey. So, information about experience of the other may be inspiring.

Governmental institutes have recently become involved in internationalization of higher education and have produced policies for the organizations to be more international. This is the ideological-political dimension of educational internationalization. On one hand, the governments of the developing countries support and encourage students to study abroad, and promote national higher education to attract more international students on the other. This is rather a prestigious attempt than the one for immediate benefit (Altbach & Knight, 2007, p. 293). Institutional policies also include affiliations with international higher education organizations.

The internationalization of higher education has rapidly become subject to several approaches. It has recently been argued that another dimension of internationalization is presence and the number of international academics included in the faculty (Leporia, Seeber & Bonaccorsi, 2015). Leporia, Seeber & Bonaccorsi (2015)'s research has revealed that county-related factors are more important than organization in attracting international academics, which implies its conjunction with high-skilled human resources.

There are attempts to identify underpinning ideologies of internationalization of higher education. Stier (2004) argues that there are three ideologies behind the internationalization endeavour: idealism, involved in creating a better world through development of mutual understanding, respect, and tolerance; instrumentalism, availing higher education institutions to the needs of policy makers that look for ensuring economic growth and sustainability through internationalization of higher education, which is regarded as a major means; educationalism, employing internationalization to enrich the education of individuals' learning and learning processes. It is obvious that all three have pros and cons, and none can be found alone in the internationalization of higher education in a country. These ideologies are also in rivalry. But, they can arise in a combination, depending on the dominance and agreement among the stakeholders in a country.

The internationalization of higher education in Latvia and Turkey during the last decade will be discussed in this essay in reference to the following concepts: institutional undertakings (international affiliations of the governing bodies in both countries); organizational responses (responses of academic units to internationalization); academics (initiatives for academics such as embracement of international staff in the teaching body, and potential to gain international experience); individual propensity of academics for international affiliation to international organizations; institutional regulations / academic responses; students (programs developed for national students to gain international learning experience; programs developed for international students to gain learning experience in the hosting country). The ideologies discussed above will be referred to as perspective provider to the data collected in the two countries.

Institutional regulations and internationalization

Bologna Process is the main delineation for both countries that has a European framework as a perspective determinant, whose philosophy is based on harmonization of structural features of higher education in EU member states. A

main objective of the Process is to enrich the European citizenship for challenges of the new millennium (EHEA, 1999). It has however provided a playground for both countries that ignited the search for a broader internationalization.

The ideology of instrumentalism seems to play important role in both countries. In Latvia, attracting international students is viewed as a response to the phenomenon of population aging, as stated in the interview of Ivsina (2016) with the representative at the Ministry of Education. But, lack of internationalization strategy and legislative restrictions on the programs thought in English at Latvian universities were underlined as the main challenges of Latvian perspective. In addition, a survey conducted about a decade ago revealed that an increasing number of Latvian Erasmus students were positive about career building in another European country (Rivža, n.d.), which may lead to the loss of local qualified workforce, while trying to gain international flow to Latvian society. Instrumentalism in Turkey takes the form of response to global competition solely at the moment, since there is no population ageing phenomenon. But, the officer of Bologna Process whom I interviewed highlighted that lack of internationalization strategy and of language skills among the students create barriers to take the advantage of young population in the global perspective (Laçin, 2016). Both cases imply that instrumentalism as the underlying ideology cannot be standalone and should be supported by policies relevant to education.

Turkey

The Bologna Process was carried out by Council of Higher Education (CoHE) in Turkey, the central authority for 194 higher education units. Turkey has developed a National Qualification Framework by 2010, in compliance to European Qualification Framework (EQF), which lays out the expected qualification of graduates as part of internationalization perspective. Between 2009 and 2013, 72 universities have been awarded DS label, and 32 universities ECTS label (Labels, 2013, pp. 51-51). As of 2015, 189 universities out of 194 have been granted Erasmus University Charter.

In the last decade, Turkish HEIs have also been active in participating to and forming international joint programs, which is considered to be hallmark of European cultural, linguistic and academic diversity (Sursock, 2015, p. 43). Beside European institutions, Turkish HEIs have American partners as well. But, a survey of joint program satisfaction reports major challenges in the area of language and culture (Helms, 2014, p. 37).

Turkey has also developed its own exchange program called Mevlana Exchange Programme as a CoHE initiative, started in 2011. CoHE has signed protocol with 125 universities from 34 countries for exchange of students and academic staff. An initial report estimated 622 outgoing and 309 incoming academic staff, 595 incoming and 402 outgoing students (Mevlana, 2011). The program covers the area outside of EHEA and provides students with an opportunity of one to two semester study abroad, and academic staff with one week to three months teaching experience abroad.

Latvia

Latvia has been part of Bologna Process since it started in 1999 and several key developments have been achieved since then. Bologna Process has been carried out

by Ministry of Education and Science. Law on Higher Institutions of Education has observed Bologna Process perspective since 2000 (VVC). In regard to internationalization, the Law mandates compliance of national qualification system to European Qualifications Framework. It is also significant that the Law makes compulsory for the HEIs to include five percent of academic staff from other European Union countries than Latvia (Section 3, Paragraph 7), which makes internationalization a priority for HEIs. Between 2009 and 2013, 13 universities have been awarded DS label, and 1 university ECTS label (Labels, 2013, pp. 51-51). ECEA recognizes 49 higher education institutions of Latvia in Erasmus Charter Holders List (EACEA, 2014) Latvian Parliament has adopted amendments to the Education Law on June 18, 2015, including an article about the Latvian Qualifications Framework that concerns all categories of higher education (vocational / professional and academic) and qualifications obtained outside the education system. The amendment observes compliance to EQF. In the pursuit of expanding internationality, Latvia has developed an exchange program with Canada in 2015 for youth between 18 and 35 who seek for further training on paid employment (Embassy, 2015).

The accounts reveal that both Latvia and Turkey have mainly focused on European perspective in the internationalization of HEIs. Bologna process has been the main reference for reconsideration and reassessment of learning outcomes of academic programs in both countries. Both countries therefore share the ideological substance of Bologna Process towards building European identity through education to cope with emerging global competition. European identity seems to have been so influential that Bologna Process has not been discussed in terms of autonomy of HEIs, supposedly a major concern for Bologna Process. The paradox of autonomous HEIs and the imposition of qualification system of graduates have remained undiscussed in both countries. It is not surprising in case of Turkey where autonomy of HEIs already low due to the central administration that holds the most part of authority. Among the 29 countries, Turkish HEIs rank 28th in organizational, 23th in financial, 21st in staffing, and 25th in academic autonomy (EUA, n.d.b). Latvia however has much higher autonomy ranking 15th in organizational, 4th in financial, 6th staffing, and 20th in academic autonomy (Latvia, n.d.a). In the framework of autonomy, Latvian case can only be explained with the power of ideology of European identity, which an apparent configuration of instrumentalism. The instrumentalist internationalization of HEIs has not been exclusive to EHEA. It is being exercised in many other parts of world, as seriously criticized by some scholars. In reference to internationalization of HEIs, Schapper and Mayson argues, "The erosion of academic freedoms, alienation from university decision-making processes, accompanied by large class sizes, student diversity and the administrative and pedagogical demands of new modes of curricula delivery, characterize the academic's everyday working environment" (2005, p. 181).

Academics and internationalization

Turkey

Even though not the main concern, mobility of academics has also been included in Bologna Process. In a report by EACEA, Turkey has been mentioned

among the countries without a national policy for academics mobility (Racké, 2013, p. 7). However, there has been an increase in the total number of incoming and outgoing academic staff between 2005 and 2013 (Çetinsaya, 2014, p. 161). In 2013, there has been 2.550 incoming and 3.886 outgoing academic staff in Erasmus Exchange Program. International academic staffs are mostly hosted by foundation universities, totalling 1% of the total number of academics in Turkey. The 2% quota for international academics in the legislation is still away from being fulfilled. Yet, Turkey has been included among the top sending countries in 2012-2013 academic calendar (Erasmus, 2014, p. 11).

Latvia

In Latvia, the Ministry of Education and Science reports the number of international academics in Latvia as 138 (Ministrijas, 2015, p. 71). As Latvia has a quota of 5%, much higher than Turkey, the achievement of the target can be inspiring. It is however possible to have an idea about international academic staff with the data available on the webpage of University of Latvia, which has 822 academics in total, with 93 internationals (Key Documents and Statistics, 2015), which counts more than 10%. It is apparent that some universities hire international academic staff more, while some others do not. It is also worth nothing that National Development Plan of Latvia for 2014-2020 includes measures for academic mobility in the pursuit of projects suitable for commercialization in Latvia (2012, p. 30).

Students and internationalization

Turkey

Turkey has sent 71.196 students to other Erasmus countries and 27.761 students from them between 2004 and 2012 (Çetinsaya, 2014, p. 159). Yet, the percentage to the total number of students is still low, partly due to the new universities opened recently. In 2012-2013, Turkey has been among the top sending Erasmus countries in number, but with a low percentage, again, due to the new universities. The evaluation does not seem to be realistic, as the new universities cannot be candidate for Erasmus program instantly. But, in a six year prospect, the report prepared by National Agency in 2013 reveals that the number of outgoing students was behind the 2020 targets of Bologna Process with approximately 10.000 students per year (Ülgür, 2013). The Report indicates that the annual increase should be 22%. By 2020, 20% of graduates should have joined the student mobility through Erasmus. The report also points out that the main reason of the low percentage is lack of language skills among the students.

Latvia

Latvia on the other hand is among the top sending countries in relation to the share outbound students in total student population (Erasmus, 2014, p. 17). In an insightful survey-based research, Karina Oborune reveals the impact of Erasmus Program on Latvian youth (Oborune, 2012). However the main focus of the study is to discuss the meaning of the concept of European identity, she provides details about the profile of Latvian higher education students in regard to Erasmus Program.

A gender-related phenomenon has also been identified in Latvia, like many other European countries, as far as the number of outbound students is concerned. Female students interested in Erasmus program is 1.5 time higher than male students, implying that male Latvian students are underrepresented in Erasmus. Another imbalance that Latvia is experiencing is the low share of incoming students in comparison to outgoing students (Grabher, Wejwar, Unger & Terzieva, 2014).

Conclusion

In the perspective of Bologna process, both Latvia and Turkey are in a need for internationalization strategy developed and implemented by national governing bodies. It may even be argued that such a need in both countries emerged during the adaptation to the Bologna Process. Turkey has a clear ideology of instrumentalism, attempting to be prepared to the global economic processes. The ideology is shared by Latvia, with the additional motif of ageing population, which is common in many European countries. Latvia is now in the process of radical changes of education system. Much effort is being put on relating higher education with industrial activities. In this process, it is also expected that revisions would ease internationalization of higher education. Turkey on the other hand still lacks an attempt to make changes required for both Bologna Process and other possible options for internationalization. Even only the issue of language skills by itself may require substantial policy changes in education system.

EHEA's framework requires a top-down structure that governing bodies operate the process. As a complementary response to this flow a bottom-up approach from academics would help define problems and barriers. By the very nature of the topic, such studies are in fact inclined to policy making analysis. Policymakers may avoid such comparisons due to the apparent reason of politics. It is therefore on academics to advance the perspective in order to achieve better results on internationalization of higher education in an increasingly global world. Further research in the framework of this paper or alike is certainly needed to come to some conclusions.

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Lifelong Learning: Capabilities and Aspirations

Abstract

The present paper discusses the potential of the capability approach in conceptualizing and understanding lifelong learning as an agency process, and explores its capacity to guide empirical studies on lifelong learning. It uses data for 20 countries from the Adult Education Survey (2007; 2011) and focuses on aspirations for lifelong learning. The study results show that there are considerable country differences in the level of people's aspirations. They highlight the fact that, despite the growing emphasis on lifelong learning, the level of aspirations has decreased in half of the European countries. However, this decrease occurs to a greater extent among people who did not participate in lifelong learning, but wanted to participate, than among people who had already participated in some form of education or training in the previous 12 months.

Keywords: lifelong learning, capabilities, aspirations

Introduction

The last two decades have been marked by an increase in the valuing of education over the course of a lifetime on the one hand, and an inflation of credentials on the other. In this context, the emphasis on lifelong learning (LLL) has grown, both in policy context and in literature. It has become one of the Europe 2020 strategy priorities for education and there is a growing body of literature on it. Despite that, data show considerable country differences in participation in education and training (last 4 weeks) of people aged 25-64. More specifically, in 2014 it ranged from below 2% in Bulgaria and Romania to more than 20% in Finland, Iceland, and Denmark (Eurostat, code: trng_lfs_01. Data extracted on 02.03.2016). Thus, although EU countries have set a target, according to which, by 2020, 15% of adults aged 25-64 should be taking part in LLL, in 2014, only seven countries had reached the target rate. Recently, current practices and policies in lifelong education have been criticised as narrowly-defined, i.e. as related mainly to employability of people and not enhancing agency and good lives (Walker, 2012). So far in the literature, more attention has been paid to actual participation and less on aspirations for LLL. Against this background, the aim of the paper is twofold: to theoretically outline the potential of the capability approach (CA) in conceptualizing and understanding LLL as an agency process, and to show the capacity of this approach to guide empirical studies on LLL.

Literature review

There is a huge body of literature on LLL (e.g. Aspin et al., 2012; Boyadjieva et al., 2012; Crowther, 2004; Milana & Holford, 2014; Usher, 2001). The concept gained popularity given the huge insecurity in the labour market and the permanent need for acquiring new skills. Nevertheless, the debate around it remains extremely vibrant – LLL has not only been defined as a new paradigm of education in the

contemporary societies (Usher, 2001; Boyadjieva, 2006), but also as a ‘deficit discourse’, which places the responsibility of economic and political failure at the level of the individual, rather than at the level of systemic problems (Crowther, 2004). In this context, the CA has a potential to balance both views. It allows us to take into account both the individual agency and the role of structures when studying the participation in LLL by the acknowledging of the so-called ‘conversion factors’. They influence how a person can be, or is, free to convert the characteristics of the good or service into being or doing. There are three different types of conversion factors: *personal*, *social* and *environmental* conversion factors (see Crocker & Robeyns, 2009).

This approach pays special attention to agency, and regards people as dignified and responsible individuals, who shape their own lives in the light of the goals that they have reason to value. Understanding LLL, not only as agency achievement but also as an agency process, is very important in order to capture its difference from traditional school education, with respect to the positions of the actors involved in it. In LLL, students are subjects of their own action, for their inclusion in education can only occur as a result of their personal decision. Furthermore, the ‘lifelong learning’ may be understood as “a positive process of deepening understanding and reflection in which learning forms our distinctive agency as rich human beings who are economic agents, but much, much more than this” (Walker, 2012, p. 190).

The CA is associated with the names of the Nobel prize-winning economist Amartya Sen and the political philosopher Martha Nussbaum. In essence, the CA is based on a view of living seen as a combination of various ‘doings and beings’ (called ‘functionings’), with quality of life to be assessed in terms of the capability to achieve valuable functionings (Sen, 1993, p. 31). More specifically, the concept of ‘functionings’ reflects the various things that a person may value being or doing (e.g. being employed or happy). In contrast, a person’s ‘capability’ refers to the alternative combinations that are feasible for a person to achieve. It is a special kind of freedom and, as such, is associated with “our ability to achieve various combinations of functionings that we can compare and judge against each other in terms of what we have reason to value” (Sen, 2009, p. 233).

Research has shown that education is crucial for well-being and, as such, should be directed towards expanding people’s capabilities (Walker & Vaughan, 2012). This can be understood both in terms of *capabilities to access education* (e.g. is schooling affordable for all; can anyone aspire to go to university?), and also in the *capabilities that persons gain through education* (e.g. self-confidence, economic skills). Although the link between education and capabilities has been widely explored (e.g. Walker & Unterhalter, 2007), the majority of studies focus on formal education and there is scarce research which applies to LLL.

Talking about capabilities in access to education, it is worth acknowledging people’s aspirations. Aspirations are recognised as an important signifier in education policy discourse nowadays (Unterhalter et al., 2014) and can play an agency-unlocking role (Conradie & Robeyns, 2013). Some of their main features are that they: i) are *goal-oriented*, ii) *concern the future* of the self in relation to the self or the agency of the self in relations to goals concerning others, iii) have a *dynamic and multi-faceted nature*, and iv) are *deeply context dependent* (Hart, 2012; Conradie & Robeyns, 2013). Via the CA lens, aspiring can be seen as a *functioning*,

as a *capability to aspire* or as a *meta-capability* (Hart, 2012). The way in which aspirations are generated, together with factors which help and hinder students, may have an effect on the agency an individual has to achieve their aspirations (ibid.).

Methodology

The study draws on data from the Adult Education Survey. It has been chosen because it contains questions on aspirations. This survey is a part of the EU Statistics on LLL and uses a 12-month reference period for participation in education and training. The new wave is yet to be carried out in 2016. Given this, only the data from the pilot phase (in 2007) and from the first wave (in 2011) are used. The target population of the survey is composed of people aged 25 to 64. The pilot phase was carried out in 29 countries, and the first wave in 30 countries. However, the analysis is limited to only 20 countries, for which data on aspirations for both years are available at the Eurostat website (<http://ec.europa.eu/eurostat/data/database>). These are Austria, Belgium, Bulgaria, the Czech Republic, Cyprus, Estonia, Greece, Hungary, Italy, Finland, Latvia, Lithuania, Netherland, Norway, Poland, Portugal, Spain, Slovakia, Slovenia and Sweden.

In order to capture the level of aspiration at country level, we were interested in the distribution of the will to participate, or participate more, in LLL (code: `trng_aes_175`). We also looked at the obstacles reported as the most important for people who did not participate, but wanted to participate, in LLL in a given country (code: `trng_aes_180`). These data are available only for 2007. Data were extracted on 02.03.2016.

Results

The analysis shows that the level of aspirations for LLL differs considerably depending on the country people live in. More specifically, the countries with the lowest proportion of respondents who wanted to participate in 2007 were Hungary (9.7%), Bulgaria (12.6%) and Portugal (14.3%). At the other end of the scale were Cyprus, Sweden and Norway, where more than 35% of people wanted to participate. Although this paper does not aim to explain these differences, it suggests that they may be due to a wide range of factors, which determine how people convert the resources and opportunities they have into aspirations for LLL. Countries have different public policies towards LLL and different traditions in this area. Thus, it is worth acknowledging that the LLL paradigm is quite new in post-communist countries. For instance, the first National Strategy for Lifelong Learning in Bulgaria, which is among the countries with the lowest level of aspirations for LLL, was adopted in 2008. Despite its adoption, the participation rate in LLL has increased, between 2007 and 2013, by only 0.5%. It points to the acknowledgement of a wider country context, in which the policies operate and which determines their effectiveness. The variety of state welfare regimes where people live (Rubenson & Desjardins, 2009) may explain the levels of participation, and also why the levels of aspirations for LLL are so uneven across countries. These are all examples for social conversion factors, which may potentially explain the differences in the level of aspirations for LLL across countries.

The study also shows that the level of aspirations seems to differ according to whether the respondents have already participated in LLL or not. This is in line with Walker's study (2007), which shows that school may open new aspirational possibilities, and expand girls' horizons for action and life. Although here it is not possible to make a distinction by gender, and the analysis is limited only to aspirations regarding LLL, the results suggest that LLL also expands people's horizons for action.

Data analysis reveals that Italy and Greece had the lowest proportion of respondents who had already participated in education but wanted to participate more. At the same time, they are among the countries with the highest rate of people who did not participate in education or training but wanted to. It is well-known that the higher the level of education, the higher the participation rate in LLL. Furthermore, different studies have shown that the advantages (or disadvantages) in early adulthood continue to influence LLL capability throughout life (Yaqub, 2008; Walker, 2012). However, this controversy questions the quality of the educational or training activities offered in these two countries. At the same time, Cyprus seems to be a high-aspiration country, regardless of whether people participated in any form of LLL in the previous 12 months or not.

As mentioned above, aspirations have a dynamic nature. People may change their aspirations over time. Data show that, despite the growing emphasis on LLL, in 11 of the countries the aspirations of people aged 25-64 to participate in LLL have decreased in the period 2007 to 2011. The most significant decrease is seen in the Czech Republic, Cyprus and Lithuania, but the level of aspirations also decreased in Slovenia, Sweden, Latvia, Bulgaria, Belgium and slightly in Finland, Austria and Greece. However, this decrease seems to differ according to whether people had participated in education in the previous 12 months or not. Thus, in 12 of the countries there was a decrease and only in seven countries we see an increase of aspirations among people who did not participate in education. This increase was very modest and ranged from 0.4% in Hungary to 3.2% in Estonia. However, among respondents who had already participated in some form of education and training, this increase was much more considerable. It occurred in 11 countries and ranged from 0.2% in Poland to 13.6% in Slovakia. Most probably, one of the determinants of this decrease is due to the effects of the economic crisis in 2008. In times of crisis, not only businesses but also individuals may spend less money on education. Nevertheless, it seems that the crisis did not hit the countries in the same way and respectively had uneven effect on people's aspirations towards LLL.

To shed more light on the barriers to the participation in LLL, we explored the obstacles reported by the highest proportion of people in a given country. We looked at the group of people who did not participate in education, although they wanted to and identified three main groups of countries where the highest proportion of people reported that: 1) the cost was too high: Bulgaria, Estonia, Latvia, Lithuania, Poland, Romania, Slovenia and Slovakia, 2) family responsibilities: Belgium, the Czech Republic, Greece, Spain, Cyprus, Austria and Portugal, and 3) the training conflicted with work or that it was organised at an inconvenient time: Finland, Norway and the United Kingdom. In Sweden, the highest proportion of people reported that health problems hindered their participation in LLL, although they aspired for it.

Conclusion

The paper has explored the potential of the CA in conceptualizing and understanding LLL as an agency process. Agency is of a crucial importance when we consider forms of education that go beyond the compulsory stage. The study has also focused on the aspirations for LLL, because their raising is perceived as key to enhancing the capabilities of people to access LLL, and because of their agency-unlocking role. Drawing on data from the Adult Education Survey (2007; 2011) for 20 European countries, this paper has identified that there are considerable country differences in the extent to which people aspire for LLL. The data analysis shows that, despite the growing emphasis on LLL, the level of aspirations has decreased in half of the countries. However, we found that this decrease occurs to a greater extent among people who did not participate, but wanted to, than among people who had already participated in some form of education or training in the previous 12 months. This suggests that LLL may be seen also as an agency process. This paper has also shed light on some of the obstacles that hinder participation in LLL across European countries. Overcoming these barriers requires using different measures but also paying attention to problems in other spheres of life such as income, family and health.

The main limitation of this study is that it relied on data only at aggregate level. Thus, it was not possible to identify whether there are within-country differences in the aspirations towards LLL among groups of people with different educational level, gender and labour market status. It is a matter of further studies to use data at individual level, which would allow the employment of more sophisticated statistical analyses and thus enable us to take into account both the context features in which aspirations for LLL are shaped and the individual characteristics which may influence these aspirations. This will help us to explain the country differences which we have identified in the present study.

Overall, the present study suggests that making LLL a reality demands widening its participation as a matter of enhancing the agency of people, which has not been achieved for many European countries so far. It would require raising the people's aspirations and overcoming the obstacles that hinder participation in LLL, which are context-specific and affected by the economic situation of the country people live in, but also widening the capabilities that people gain through LLL, which may go beyond the purely economic gains.

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Amanda S. Potgieter

Where Have All the Teachers Gone: A Case Study in Transitioning

Abstract

This paper reports the autobiographical narrative of Mr. L, as case-in-point example of the thresholding moment and the process of transitioning into Academia. The role of the lecturer-mentor and the multi-logic space that facilitates the process are clarified. I use hermeneutic phenomenology and interpretivism as methodological tools. This *ex post facto* qualitative study was done to elucidate the concepts and iterative processes involved in transitioning. I conclude that the novice student needs a lecturer-mentor guiding him through this life-changing event.

Keywords: thresholding, transitioning, mentor, dialogue, multi-logic, multivoicing

Introduction

Thresholding and transitioning can be conceptualized as an event or point of orientation where a change of relationships as well as change with regard to practices and roles in a person's life are evident. Novice students in the position of thresholding and transitioning into Academia are perceived as adults in transit (Schlossberg, 1984, pp. 5-13). These students find themselves in an anticipated liminal situation where they will experience the impact of the thresholding and transitioning into Academia (Evans *et al*, 1998, p. 3).

In this brief report on a qualitative *ex post facto* case study report I will relate the thresholding and transitioning process of Mr. L, a novice academic, towards becoming a confident citizen of Academia. During a semi-structured interview (Tracy, 2013) Mr. L told his own story of this journey as a novice and the lecturer who guided him from the threshold of Academia through his own, personal transitioning process. His narrative is one of 25 student narratives forming part of a project on novice student thresholding and transitioning.

In this paper I will, therefore elucidate the process of thresholding and the transitioning process, the role of the lecturer-mentor in this process and the sanctuary in which the process takes place. As a clarifying example of this process I will relate the case of Mr. L.

Thresholding versus transitioning: Where have all the familiar beacons gone?

Thresholding refers to a static process, almost a moment frozen in time; a reflective pause or a contemplative plateau. Transitioning, *per se*, refers to an active process, based on a clear decision to proceed, resulting from the thresholding moment of reflection and contemplation. Transitioning is, however, a life changing event spanning time and emotional space with an identifiable end point and a definite, acknowledged and recognized moment of transcending.

One of the defining characteristics of transitioning is a person's awareness of the process of transitioning (Meleis, 2010, p. 19). Although the novice student (i.e. first year Higher Education Institution [HEI] students) might not consciously be aware of his/her level of engagement with academic transitioning, s/he is mostly aware of the change and differences with which s/he is confronted with within the new environment. Transitioning could not only be described as the result of change, but it is important to realize that it also results in change (Meleis, 2010, p. 19).

Students in transition, given the fact that levels of transitioning are individually perceived, are captured in a time continuum where they might feel different than they did before. These time-dependent episodes can be referred to as liminal moments where the student negotiates meaning framed within this process of transitioning (Meleis, 2010, p. 20).

The concept of liminality, as used in the social sciences, refers to a process of inevitable transitioning that is always characterized by a certain amount of insecurity and yet provides the potential for creative innovation as ontic feature (Thomassen, 2014, p. 10). In its core, experiences of transitioning contain autonomy and *angst*. These moments of transitioning, the living through the in-between, constitutes part of the spatial dimensions of the authenticity of transcendence (Potgieter, 2015, p. 54). This is especially true for the novice student entering Academia for the first time and for whom many of the social and academic constants they have encountered up to this particular juncture have fallen away. For them, transitioning can be life-altering although it often might swing towards crisis (Thomassen, 2014, p. 10). Liminality presents a challenge to the novice student who should learn how to cope with his/her changing academic environment.

It is against this backdrop that the role of the lecturer-mentor becomes increasingly significant as creator of academic sanctuaries for students from where they can safely transcend into Academia.

The lecturer-mentor: “Where have all the teachers gone? Oh, when will they ever learn?”

The primary goal of universities and therefore of lecturers regarding learning and teaching is more often than not the facilitation of knowledge and skills acquisition, together with the paracletic accompaniment of the students towards academic prowess (Haggard *et al.*, 2011, p. 286). The results of these goals are assessed and evaluated through a myriad of assignments, tests and examinations. For this reason, novice students often experience fear of failure during the process of thresholding into Academia, because they feel judged rather than guided by their lecturers. In order for novices to be immersed into the environment of Academia they should be accompanied on their journey by a lecturer who is also a mentor. These lecturer-mentors should be academic examples of scholarliness and they should be accessible and approachable, as well as non-judgemental, intuitive and empathetic to the needs of students (Haggard *et al.*, 2011, p. 287).

The academic lecturer-mentor has to guide his/her students from novice students through the transitioning process by being a *paraclete* to them (cf. Medieval Latin: *paracletus*; cf. also: mid-15c., *Paraclit*, a title of the Holy Spirit, from Old French *paraclet* (13c.), from Medieval Latin *paracletus*, from Greek *parakletos* “advocate, intercessor, legal assistant”, noun use of adjective meaning “called to one’s aid”,

from *parakalein* “to call to one’s aid”, in later use “to comfort, to console”, from *para* “alongside” + *kalein* “to call”, *paraklētōs* (Greek) or *paraclete* (English) to them (Collins dictionary, 2016).

A lecturer-mentor becomes a *paraclete* to her students when she takes on the role of advocate or helper; when she becomes an intercessor to them on their journey into Academia for which they receive no roadmap or GPS co-ordinates. *Paraklētōs* in Greek means to call someone (*kalein* / *klētōs*) alongside (*para*) in aid of a person in need of assistance (Collins dictionary, 2016). Therefore the lecturer-mentor who guides the novice towards transitioning fulfils more than the role of a mere teacher. Instead she becomes a counsellor who escorts her students through the transitioning period into Academia. The lecturer-mentor is not walking in front of her novice-students or pushing them from behind; she walks alongside them (i.e. she accompanies, or “is alongside” them) on their journey of transitioning.

The liminal experience of thresholding and transitioning into the academic environment is enhanced by multi-logic spaces where curiosity about and focus on the academic challenges of Academia are key attributes of the academic literacy classroom. In this educative nurturing space the lecturer-mentor and her students engage meaningfully and with academic curiosity with socially rich experiential, conceptual and reflective learning. Monological teaching disregards the voices that should be heard in the multi-logical classroom where the lecturer-mentor encourages constructivist interaction between herself, her students as well as with reading texts and subsequent student-generated writing (Rule, 2007, p. 320).

Academic sanctuaries: “Where have all the students gone? Gone to classrooms every one.”

In this section I outline the dialogical situation between the lecturer-mentor and the novice student in the multi-logic educational context in an attempt to try and demonstrate where and how dialogue becomes important in the liminal thresholding and transitioning process.

Scholarly understanding of the concept of dialogue has become conceptually progressively limiting and pedagogically contentious over the past five years or so. Expanding on the work done by Leganger-Krogstad (2014, pp. 104-128), I therefore wish to introduce the concept of pedagogic multi-logic into this particular context. Authentic teaching-learning environments should make available and facilitate the foundation and preservation of pedagogic spaces of security and safety for multi-logic rendezvous and collaboration between lecturer-mentors, students and academic content (Potgieter, 2015, p. 57).

The notion of pedagogic spaces (pedagogic sanctuaries) that seek to provide safety for multi-logic engagement and interaction can, possibly, best be enlightened using Rule’s definition (2007, p. 319) of dialogic space as an intellectual and socio-conventional space where role-players can intermediate within a non-threatening environment. A sanctuary in this context refers to a place or space where a student may feel safe to express personal views and opinions and to make mistakes without fear of being ridiculed. However, a sanctuary always includes opportunity for both silence and for authentic dialogue. Creating pedagogic sanctuaries and safe spaces for open, yet focused and validated multi-logic, built on mutual trust, support, respect, honesty, critical thinking and open, vibrant communication will provide

both lecturer-mentors and novice students with a practice ground for classroom-based discussions where they can experience authentic and pedagogically justifiable conversational safety from pursuit, persecution, disrespect, ridicule or any other danger or form of personal awkwardness or embarrassment (Potgieter, 2015, pp. 57-59).

Multi-logueing, as an evolving hybrid of educational dialogue, intentionally endeavours to extend the conventional notion of classroom-based dialogue between lecturer-mentor and novice students by introducing additional 'voices' (besides that of the lecturer-mentor and her novice students) for the length of any teaching-learning contact session. These voices might take the form of a variety of pedagogic tools and strategies of, and for conciliation between the lecturer-mentor and her students. They might, for example, include (depending on the class-size itself, as well as on the nature and choice of the relevant academic curriculum and related themes) objects, theoretical themes, political, traditional, lifestyle as well as shared and socially relevant themes, values-driven texts for discussion, or even practical oral and written assignments (Potgieter, 2015, pp. 57-59).

The lecturer-mentor remains responsible for the interaction in her classroom. The lecturer-mentor designs and creates pedagogical spaces of safety, and chooses what educational material to pay attention to (Leganger-Krogstad, 2014, p. 104); she is the one who sets up the rules for the multi-logues in her classroom in order to facilitate pedagogically successful interactions with her students and all other voices, as exemplified above (Rule, 2007; Potgieter, 2015, p. 57).

Within a pedagogically safe multi-logic space, it is the lecturer-mentor's pedagogic duty to use her classroom-specific linguistic skills to journey together with her students and to scaffold activities in order for the students to eventually be able to progress towards the next step in the process of learning and thresholding. The pedagogic tools and strategies provided in pedagogic sanctuaries are expected to help mediate the process of learning and teaching, assisting all role-players to interpret and construct appropriate sets of mutually beneficial understanding. This requires the lecturer-mentor to choose the tools and strategies that might be needed on the basis of didactical considerations to enhance the multi-logue and to engage with, explore explain and understand academic skills (Leganger-Krogstad, 2014, pp. 106, 123). The tools and strategies should, therefore, be designed, selected and operationalised in such a way as to provide enough learning scaffolding – through information provided and mutually collected – eventually to become authentic – yet additional – voices in a particular, contextualised pedagogic multi-logueing sanctuary (Leganger-Krogstad, 2014, p. 113).

A case in transitioning: When will I ever learn?

As a researcher I have a phronetic approach to research which, according to Tracy (2013, p. 4), suggests that qualitative data can be systematically gathered, organized, interpreted and analyzed in order to address real world concerns. I started this project spanning three years by identifying a particular issue in Academia and then proceeded to systematically interpret the data in order to provide an analysis that explain the issue. Although this reflection or case study refers to the transcript of one participant's journey, his is only one of many other transcriptions of similar

interviews. The full transcript will be made available to scholars who are interested in this particular case study.

During a semi-structured interview with a student (for ethical purposes I will refer to him as Mr. L in this paper) doing his dissertation part of his bachelor's degree in the faculty of Law at a tertiary institution he allowed me an insight into his own, personal academic transitioning into Academia. His journey had been a multi-faceted one spanning six years. It represents the journey of many students I have so far interviewed as part of this research project.

Mr. L entered the academic sphere as a novice student after a gap year spent travelling in various countries in Europe, working at part-time jobs to finance his trip. He kept a journal of his experiences and his *coming of age* as he referred to this part of his transitioning and decided that he would study journalism on his return to South Africa. Mr. L enrolled at a tertiary institution and started his academic journey.

During the interview Mr. L indicated to me that he enjoyed some of his studies but found most of the courses unchallenging. Academic writing seemed very distant from his own style and the voice he used in his creative writing pursuits. Another aspect he found daunting was that he did not seem to be able to find a mentor among his lecturers who would listen to him and guide him academically. At the end of his first year he decided to change from a degree in journalism to law as he had become interested in the constitutional rights of men in same sex marriages as part of gender studies in the South African context. It is during his lectures in the Faculty of Law that he encountered a teacher and mentor who not only inspired him but who "alongside" him by linking up with him on his academic journey.

He pinpointed his transitioning into Academia, which was a life changing event for him both academically and emotionally, as a specific moment in his second year of studies. His narrative states:

Mr. L: "It seems I have been at the brink for more than a year, sometimes hovering close to the edge at other times retreating. But one day I was listening to this professor and I suddenly got it, ...what I had to do you know, and from then on there was no stopping me! There was no more fear, I knew she would help me if I got lost..."

It seems that the novice's transcendence into Academia, required from the academic lecturer-mentor and her novice student to undertake a reciprocal internal voyage of meaning-making and meaning-decoding (Marshall, 2009, p. 27); the ultimate destination of which is a deeper personal response to the liminality of Academia – irrespective of the specific outcomes of academic subjects or modules as such (Jones, 2005, p. 4). If education, amongst others, implies learning to see life from a different perspective, the multi-logueing sanctuary should provide both lecturer-mentor and novice student such a space which is grounded in a collective sense of belonging, as well as determination from both for the student to transcend effortlessly across the first threshold into Academia (Jones, 2005, p. 4; Marshall, 2009, p. 27; Potgieter, 2015, pp. 56-59).

Conclusion

Where have all the teachers gone? From what I learnt from the narratives of the novice students, the narrative of Mr. L used in this paper as example, there is a great need for mentor-lecturers in tertiary institutions. We should not talk to our students,

we should listen to them. Novices want and need us to teach about life, not only knowledge and skills. Mentor-lecturers are not bound by curriculums and syllabi. They connect the material at hand, in a way that feels spacious and free, connecting it to experience, and so they shed light on students' experience. Students in transitioning need prototypes (paracletes), freedom of speech (sanctuaries) and guiding beacons that will lead them over the threshold of Academia.

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An Overview of Engineering Courses in Brazil: Actual Challenges

Abstract

Brazil is one of the largest countries in the world as well one of the greatest economies among developing countries. To be competitive, Brazil needs to be able to develop technology, research and knowledge. In this sense, we argue that economic growth is directly related to technological development, which is linked to the investments in infrastructure, education, technologies and research mainly from engineering. Engineers must be prepared to develop solutions and technologies and to contribute to the well-being of society. The main purpose of this paper is to present an exploratory study concerned with the general overview of Brazilian engineers' graduate and postgraduate courses as well as their current occupation.

Keywords: engineering, education, Brazil, competitiveness

Introduction

Brazil, as several other developing countries, is facing a number of challenges to remain competitive in the world scene. One way to achieve this is to develop technologies to ensure the country's differential based on knowledge capital (Cordeiro et al, 2008). Ferreira (2015) argued that universities have a crucial role in finding ways to improve Brazilian industrial competitiveness through improvements in education, research, knowledge and new technologies aligned to labour market and society's needs.

According to Oliveira et al (2013), the sectors that compound countries' GDP are related to international competitiveness. The researchers concluded that countries' continued economic growth is connected directly to technological growth, which is linked to investments in the infrastructure, research and development of technology and engineering professional education.

Cirani et al (2014) and Salvador et al (2014) also highlighted the relevance of postgraduate studies' programs to the process of nations development. The authors pointed out that postgraduate research must go hand in hand with society's technological and social needs and that applied knowledge is an important asset for countries' economic growth that is disseminated through publications and scientific research from postgraduate programs.

In addition to boosting the country's competitiveness, Cordeiro et al (2008) argued that engineers must be prepared to develop solutions according to the needs of the population and contribute to the well-being of society. Thus, graduate and postgraduate programs in engineering should be able to provide students with tools and knowledge to allow them a systemic analysis of not only productive factors, but also the society as a whole, going beyond technical and traditional knowledge of engineering. This exploratory research is a part of a broader research on the engineering courses in Brazil, which characterizes the limitation of this study.

Prospects of engineering graduation in Brazil

Engineering education emerged in Brazil motivated by the need to create and maintain military capabilities at a time when the country was still a part of the Portugal kingdom. In 1699, the first school for military engineers was instituted. In 1738, the military engineering education was formalized, requiring a minimum of five years for engineers training and education, which is still in effect today for both civilian and military engineers (Moraes et al, 2009).

OECD (Organization for Economic Co-operation and Development) developed an international standard for “engineering degree” divided into 55 engineering modalities. Thus, to allow for international comparisons, the Ministry of Education (MEC) in Brazil adopted this standard.

In this paper, the analyses were based on the data collected from the EngenhariaData Indicators System (EngenhariaData, 2015), reports from Innovation and Competitiveness Observatory (OIC, 2015), and INEP (2013) data related to engineering graduation courses. The previous results about number of courses, vacancies, freshmen and graduates of engineering courses in Brazil from year 2000 to 2013 are also discussed.

Number of courses offered

According to INEP (2013), there are over 3,000 engineering courses in Brazil, and around 59,000 engineers have graduated in 2013, an increase of approximately 340% during the studied period.

The increase in the number of courses in Brazil can be explained by the significant economic growth observed in the country in recent years. The availability of courses is higher in the Southeast (54% of available courses), South (20%) and Northeast (14%) regions and lowest in North and Midwest (6% each). The Southeast region offers large number of courses primarily because it is heavily populated and most economic/productive activities of the country are carried out in this particular area.

Regarding graduate engineering programs, production, along with civil, electrical, mechanical and computer engineering have the highest number of courses available. In general, it can be noticed that the number of courses offered had grown throughout the country in all regions.

Number of vacancies

During the 2000-2013 period, a growth in total vacancies offered for engineering graduations courses for undergraduate students around the country was recorded, a change of 450% (392,388 in 2013 against 71,095 in 2000). A higher concentration of vacancies is also offered in the Southeast area (63%), which also has the greatest concentration of courses. Civil engineering presented the largest number of vacancies (101,367), followed by production engineering (74,201), mechanical engineering (47,259), electrical (43,389), control and automation (24,250) and computing (16,175) (EngenhariaData, 2015).

One of the drivers of the number of the growth of vacancies offered are the expansion programs of universities promoted by the government, such as the Program of Support for the Restructuring and Expansion of Federal Universities (REUNI) (OIC, 2015).

Number of freshmen students

The admission of students to graduate engineering courses is related to the amount of vacancies offered. Regarding geographical dispersion, 58% of enrolments were noted in the Southeast region and 15% in the South. This is due to several courses options, the positive development of infrastructure and construction of various facilities in the period, which attracted 34% of enrolments in civil engineering, followed by production engineering with 17% of admissions and mechanical engineering with 12% in third place (EngenhariaData, 2015).

Number of graduating students

Among the analysed variables, the number of graduating students has the greatest effect on the country's development. The analysis by region shows the strong relationship between the national performance and the performance of the Southeast region, as it corresponds to the majority of graduates. Regarding engineering graduation, since 2010, production engineering has had more graduates, e.g., 10,938 engineering graduates in 2013, compared to other fields, such as civil engineering, with 5,526 graduates.

The data from OIC (2015) showed that the overall dropout rate in engineering courses in 2013 in Brazil was 22%, higher compared to the average of other graduate courses due to the precarious and incipient basic training of these students in sciences and math in elementary school (Nascimento et al, 2014; Saboia & Salm, 2010; Pereira et al, 2013; Salerno et al, 2014).

The duration of an engineering course in Brazil is five years as already mentioned above. In 2013, out of 148,452 students who enrolled in 2009, 59,798 completed degree in engineering indicating that only 40% of students who started the program completed it.

Compared to other countries, Brazil had 2.97 new engineers in the labour market for every 10,000 inhabitants in 2013. Regarding economic, social, and cultural differences, Finland (first in ranking), South Korea (second) and Slovakia (third) graduated 34.02, 32.73 and 28.41 engineers per 10,000 inhabitants in the same year, respectively (OIC, 2015). A study presented by Rydlewski (2014) showed that among all the graduates in the country in 2011, only 5% were from engineering modalities while in China, over 40% of the graduates were from engineering program in the same year. In 2013, the numbers in Brazil improved, as 7% of all new graduates were engineers.

Although much has been done to boost the number of graduates in engineering in Brazil, and the results show significant improvements compared to the previous years, external comparison, on the other hand, shows that much needs to be done to improve competitive rates internationally. This is a challenge for all the regions of Brazil.

Postgraduate programs in engineering in Brazil

According to Geocapes (2015), the data on postgraduate engineering programs, in Brazil showed the total number of enrolments in 2013 were 28,409, with 14,900 students in master's degree programs, 2,909 in professional master's degrees and 10,600 in doctoral degrees. In the same year, 5,591 engineers received a master's

degree and 1,568 engineers received a doctor's degree. Of those enrolled in all postgraduate programs across the country, 13% were in engineering programs, and 11% of those who graduated in 2013 were engineers.

Additionally, Farjado (2012) presented a study on the destination of masters and doctors in Brazil. According to the author, 48% of doctors and 32% of masters landed jobs related to education. In contrast, only 2% of the doctors and 5% of masters were working directly in the manufacturing industry. The data presented by Teixeira et al (2012) highlighted that the global average placement of researchers in industry is about 39%. According to the author, Brazil has 50,000 researchers working in the domestic industry while South Korea has 160,000 and the United States has more than 1 million researchers in the industry.

Low placement rate of researchers in Brazilian companies could be one of the main factors that might limit the performance of the domestic industry (Teixeira et al, 2012). According to the author, the country needs to increase the direct and indirect placement of researchers (mostly engineers) in the industrial sector to ensure that national research generates knowledge able to meet the country's technological and social demands.

Thus, a challenge seems to lie on the postgraduate engineering programs, specifically in being able to generate enough knowledge to leverage the domestic industry. In addition to boost in the education of masters and doctors in engineering, it needs to ensure that the studies are aligned with the needs of the Brazilian business sector, and they promote technological development and innovation.

Regarding the expansion of postgraduate studies in engineering, data from Geocapes (2015) showed that postgraduate studies have not followed the growth of other graduate courses in the last years. In this scenario, training and qualifying engineers seems even more aggravating in postgraduate courses. Although the quality of postgraduate programs in engineering in Brazil is internationally recognized, the number of vacancies is limited compared to international programs (Teixeira et al, 2012).

Oliveira et al (2013) showed that education and training of researchers (masters and doctors) in engineering in Brazil is far below compared to those in developed countries, which might limit the quality and quantity of technological knowledge produced in the country. According to Steiner (2005), a university with postgraduate courses that focus on research can be seen as a strategic factor for competition in the era of the knowledge society.

Looking for the engineers in Brazil

As shown in previous sections, even with high dropout rates, engineering as a whole is facing a period of expansion in Brazil driven mainly by the economic recovery experienced in the last decades (Nascimento et al, 2014). It is important to point out that in Brazil, there are both public (maintained by the federal and state governments) and private universities and that the number of engineering courses offered by private universities is much higher compared to the public ones. The data presented and discussed present the average of all engineering students from both public and private universities in Brazil.

Regarding to female participation among newly graduated engineers, the focus relies on chemical and food engineering, with 54.9% of female graduates, nearly 2.5

times higher than the engineering average. It can be seen that engineering courses and areas of technology in Brazil, in general, still have low female participation, as well as low placement in labour market, which further reduces the interest of women (Maciente et al, 2015).

Concerning the occupation of the new graduates, civil engineering presents the largest number of the professionals working in their field (53.4%). On the other hand, for professionals from production engineering (7%), and environmental and mining engineering (4%) that proportion is less than 10% (Maciente et al, 2015).

When considering the relevance of engineering for the country's technological development process, the general numbers sound alarming, since these activities are usually not the main leading areas of choice for the new graduates. Education and research in engineering and science and technology fields are activities most related to technological development, as the numbers show that 3.8% of new graduates are dedicated to such activities. A large number of engineers (25.6%) are working in different fields outside of engineering in Brazil.

Salerno et al (2014) also argued about where the engineers trained in Brazil would be working. Service sector and manufacturing industry appear to be the main employers of engineers in the country, with a considerable increase in contracts from year 2005 accompanied by significant economic growth.

According to the mentioned author, companies with 100 or more employees are more likely to hire engineers in Brazil due to potentially concentrated complex operations with high benefit. Employing engineers in micro and small enterprises still represents a small portion of the total amount. Thus, it can be seen that the main destination for engineering professionals has been the service sector and the manufacturing industry, especially in large enterprises.

The data from INEP (2013) shows that out of 272,110 engineers working in Brazil, 268,940 are Brazilians and 3,170 are foreigners. Among the foreigners, most of them are Portuguese and Latin Americans. Concerning the geographical areas of the country, the Southeast region has the vast majority of the employed engineers (169,006), followed by the Southern region (40,801), Northeast (34,271), Center-West (17,817) and North (10,214).

Conclusions

The aim of this paper was to present an exploratory study to offer an initial overview of Brazilian engineers' graduate and postgraduate courses as well as their current occupation.

The numbers of courses, vacancies available at the universities, and freshman and graduate students enrolled in engineering graduate courses in Brazil have shown a significant increase in the past years due to economic growth and in part due to the understanding of the important contributions of these professionals to the country's development and competitiveness.

Another point to consider is that most courses are offered in the Southeast region, which has also the greatest numbers of graduated engineers. This region has the highest population in the country as economic development. This supports the statements of Oliveira et al (2013) and Cordeiro et al (2008) that economic growth is related to technological development and investment in technology and engineering, which are most pronounced in the Southeast region of Brazil.

Regarding the number of engineers employed in Brazil, the percentage of foreign engineers working in the country does not reach 0.5%. It cannot be said that foreign engineers are taking place of Brazilian engineers in companies. In fact, placement of engineers in companies in general, especially in micro and small enterprises, is low, as the importance of these professionals in the improvement of products and processes, benefit enhancement and cost reduction has not been acknowledged. It is also important to highlight that the low number of foreign engineers in Brazilian companies may limit the exchange of cultural experiences and understanding of multiculturalism as a factor that leads to competitiveness, as mentioned by Canen & Canen (2005).

In future research, we intend to expand this exploratory study, since this is part of a larger research aimed to study the engineering courses in Brazil in greater depth.

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Multiculturalism and Peace Studies for Education Provision in Time of Diverse Democracies

Abstract

The aim of the study is to examine how multiculturalism and peace studies have been viewed in Brazilian and North American literature as gleaned both from Brazilian research studies and articles presented at Peace Education Special Interest Group (SIG) in American Education Research Association (AERA), within the scope of 2010-2014, which concludes that multiculturalism and peace studies may offer groundbreaking venues to promote education provision to every one, civilian and military students together with reforms in higher education.

Keywords: multiculturalism, peace studies, SIG peace education, higher education

Introduction

Building on a study that is still in progress and has examined how multiculturalism and peace studies have been viewed in Brazilian and North American literature as gleaned both from Brazilian research studies and articles presented at SIG Peace Education of AERA within the scope of 2010-2014, this work argues that multiculturalism and peace studies may offer groundbreaking venues to promote education provision to everyone since reforms in higher education are carried out.

The argument is that in the context of the reemergence of acts of racism and increasingly diverse democracies, peace studies and multiculturalism raise for the potential they present to build fruitful dialogues that should inform political discussions and public policies in education, chiefly those toward inclusion and meaningfulness of education provision and restraining factors.

Because education policies and practices are influenced by local culture, political, socio-economical, historical, geographical, demographical and religious factors (Mariappanadar, 2005), multiculturalism and peace studies grow in importance since they present innovative ways to consider diversity in school settings which should be considered in teacher training.

Promote original teacher training, significant teaching practices, and thus reform in higher education is a need in school settings that also require closely linked with transformational leadership and appropriate education policies that consider and embrace multicultural and peace approaches within societies surrounded by cultural, religious and ethnical conflicts.

In this context, we claim for a multicultural perspective for peace approach since it problematizes stereotypes and prejudices against those considered *different* from standard measures at school settings, either in military or civil education, so as to promote inclusion and provide the provision of relevant and meaningful education to all.

Departing from a post-colonial approach (Hall, 2003; Peters, 2005), our research has been geared to challenging monocultural curricula in educational policies and pedagogic practices, shedding lights on the relevance of promoting a peace culture through investment in multiculturally oriented education professionals and organizations, embracing the military – academy, institution of higher education and capacitation/training centers – mainly in Brazil, which although beyond formal educational patterns, feel the need today to be included in society standards in order to enhance dialogues related to the field of defense and security.

The multicultural perspective that guides our work overcomes cultural contemplation to reach postcolonial and postmodern approaches that seek a more fluid, hybrid and transitory comprehension of identity construction (Hall, 2003). Multiculturalism in critical postcolonial approaches departs from the simply celebration of differences to other steps that problematize difference constructions. According to Canen (2012) theoretical and methodological responses that crosscut borders are required to build dialogues and overcome universalistic and ethnocentric views. To understand this context as hybrid and mixed (Canen, 2012) is an alternative proposal to initiate a comprehension of the field that also requires hybrid and diversified educational responses.

Therefore, our contribution relates to pinpointing emphases and gaps presented in the studies at SIG Peace Education within 2010-2014. We highlight the fact that studies in military education also beg for further dialogues with peace education to unveiling curricular intentions, limits and capabilities that have guided soldiers' preparation. This perspective is chiefly relevant today, first because military personnel have been facing new challenges and threats regarding the nature of conflicts and violence which differ from the paradigm that had guided the industrial war. Thus, one of the challenges has been to prepare soldiers to cope with the multicultural dimensions of the missions nowadays. Second, because primary and secondary military school most of the time welcome not only military personnel's children/youth but civilians too, thus have been challenged to rethink their curricula and practices in a multicultural perspective for peace (Costa, 2011) to figure out how these children/youth have been interacting in school settings and how education provision has been offered to every one – civilians and military – and how education professionals have been working to reach a multicultural perspective for peace approach. It rises of importance mainly in countries directly involved in conflicts where children/youth might find themselves traumatized and segregated at school due to their parents' deployment in combat operations.

Our main objective is to analyze how multiculturalism has crosscut the referred SIG in the scope of 2010-2014 to leverage education provision to everyone; therefore, more democratic practices in education and societies. It includes challenging the view that tends to oppose military and civil education, arguing that military curricula have been challenged so as to cope with the tensions of hierarchal practices within a multicultural organization.

In this direction, higher education may also benefit from this study since innovative teacher training and significant teaching practices should take place in higher education and focus on inter alia curricular, evaluative and pedagogic practices that consider multicultural perspectives for a peace approach.

Methodology of the study

Qualitative research (Denzin & Lincoln, 2003) guided our study that addressed a documental study, gauging the state of art in peace studies and multiculturalism in an international conference. Thus, AERA was the focus, more particularly the Peace Education SIG, due to the need to articulate multiculturalism and peace studies from a broader perspective that embraces educational settings that aim to promote education provision for all.

The methodology was as follows: firstly, we explored the summaries available at the Annual Meeting Online Searchable Program on AERA site to calculate the summaries of papers presented in roundtable, paper and symposium sessions, as well as business meetings during 2010-2014 in the SIG mentioned that had taken multicultural perspectives within peace education on board. It was not our intention to verify full papers on the Online Paper Repository, chiefly because it is a volunteer decision of the authors to upload them. However, we are aware that it may reveal other theoretical and methodological perspectives. Therefore, we suggest that other researches fill this gap in order to bring to light other relevant information that may consolidate this study. Secondly, we highlighted both explicit and implicit multicultural categories, and finally we shed lights on the potentials they seemed to convey in terms of developing fruitful dialogues with peace studies in the scope of plural educational institutions, both civil and military as well as their impact on higher education, mainly on teacher training and practices.

It is worth mentioning that this is a work in progress that intends to wide its scope from the analysis of other SIGs that have been producing work on peace studies, such as the International Peace Research Association to realize its main theoretical and methodological trends for the field and its connection with multicultural perspectives.

Findings and results

A total of 113 abstracts were studied. 8 pointed out explicit multicultural perspectives, 84 implicit ones and 21 presented no multicultural connections. Some extracts analyzed are shown below.

In 2010, we realized that out of 25 summaries presented at AERA SIG Peace Education, 3 presented explicit multicultural perspective, whereas 21 presented it implicitly.

Costa and Canen's paper (2010) sought

[...] to analyze the state of art related to multiculturalism and peace education in Brazil, as gauged from the production of PhD theses and Master dissertations in the last years. It contends that multicultural and peace oriented education could benefit from increased partnerships between Higher Education Institutions (HEIs) and military organizations [...].

In 2011, out of 26 summaries presented at the referred SIG only 1 showed explicit multicultural perspective, whereas 21 showed it implicitly.

The theory and methodology of this research were anchored by critical and postcolonial multiculturalism... This work revisits the Brazilian national curriculum for foreign language... which highlights the commitment to fostering education

public policies, curricular and pedagogical practices that emphasize inclusion, challenge of marginalization and a democratic access to schooling (Costa, 2011).

In 2012, 23 papers were presented at the SIG. 2 presented explicit multicultural perspective whereas 12 presented it implicitly.

Canen and Canen's paper (2012) argued that

[...] peace education in a multicultural perspective could help imbue Higher Education curriculum development for peace. It contends that dimension should not be limited to a separate discipline in the way of an add-on to curriculum, but rather be part of the syllabuses... in the so-called "hard sciences" linked to technological areas.

In 2013, we figured out that out of 24 summaries, 2 presented explicit multicultural perspective and 16 showed it implicitly.

Rajuan and Bekerman's paper (2013) sought to

[...] investigate how teachers of the Integrated Bilingual Schools in Israel construct their school culture in relation to various outside pressures [...]. It was found that teachers perceive themselves as primarily pedagogical experts with a shared vision of multiculturalism and coexistence to the detriment of scholastic achievements [...].

In 2014, 15 papers were presented at the SIG and there was no summary with explicit multicultural perspectives; however, 14 had them implicitly.

The results of the analysis show that the majority of the summaries analyzed are permeated by implicit multicultural perspectives and it seems that explicit multicultural ones have been rarer. Most of the works are informed by critical multiculturalism, and although they all overcome cultural celebration, they have not focused on postcolonial approaches.

When we delved into the data presented and look ahead to promises and challenges to overwhelm for the next century as well as to capture contributions to the field of peace education we reach some findings and results.

Firstly, the limited number of papers presented in 2014 in the SIG; and secondly, that this year there was no paper with explicit multicultural dimensions.

Our study points out that it seems the SIG is looking forward to working under categories directly related to peace, such as violence, conflict resolution, mediation, negotiation, reconciliation, restorative justice, restorative practices, culture of care, justice and peace, non-violence, peace education, concept of peace, humanitarian law and militarism. Although the majority of the summaries analyzed are permeated by implicit multicultural perspectives, it seems the SIG is trying to outline its field, what we consider positive. However, this argument is a gap our study did not intend to prove, but it leaves a door open for future findings.

As a result, our argument that multiculturalism and peace studies have the potential to promote partnerships, enrich the peace education field, and thus provide education provision remains valid. Out of 15 papers presented in 2014, 14 had implicit multicultural perspectives; moreover, in previous study (Costa, 2009; Costa & Canen, 2008a, 2008b, 2008c), it was highlighted that an articulation between multiculturalism and peace studies can strengthen a multicultural perspective for peace education.

As noticed before, intentions and similarities, as well as related categories between multiculturalism and peace studies lead to the conclusion that education research and organizations, either civil or military ones, would benefit from an

academic cooperation and partnership in times of globalization, multicultural workforce and on-going emerging cultural conflicts.

That is the reason why we argue the importance of building bridges in time of diverse democracies through an academic effort to embrace all educational organizations – formal or non-formal – public or private ones which are interested in urging forward governmental initiatives and public policies in education to working toward inclusion and peace at schools settings.

In previous work, for example, we developed studies with higher education institutions that realized “syllabuses in technological areas such as engineering could enhance the understanding of the meaning of multicultural organizations” (Canen, Canen, Costa, 2014). This should also be extended to military higher education curricula that have also been seeking for education research findings to support and guide their practices that look forward to capacitating their human resources to cope with the cultural challenges and threats in contemporary scenarios today.

Regarding this matter, we should cite Carter and Pickett (2014, p. 49) referring to dominant groups. These authors claim that “[...] scarcity of opportunities to interact with and come to know others with different perspectives perpetuates narrow thinking and inhibits the development of reciprocal relationships [...]”. This is especially true in multicultural organizations today, either civil or military.

In this context, we feel the need to promote dialogues between multiculturalism and peace studies so as to build more democratic practices in education and societies, mainly because the analysis of the referred SIG led us infer; firstly, that it seems the SIG is moving toward excluding other contributions to the field, and secondly, that this way, in near future Multicultural/Multiethnic Education: Theory, Research, and Practice SIG at AERA will be probably embracing studies whose primary intention would have been aimed at looking for connections and contributions with/to peace studies and peace education to promote education provision to everyone.

Conclusion

We have been witnessing global conflicts and the increasingly rise of diverse democracies in the US and around the globe. Diversity has never been so discussed as today, and thus it reinforces our argument that multiculturalism and peace studies are promising debates for fostering projects in either civil or military educational institutions – in formal and non-formal educational scenarios – to overcome monocultural curricula that raise intercultural studies and nurture multicultural for peace attitudes in education public policies and practices, either in Brazil, North America and elsewhere.

Multiculturalism and peace studies should also represent possibilities to handling with the tensions hierarchical organizations have been confronting to address the demands of multicultural organizations nowadays, mainly the military ones.

This perspective should be translated into teacher training in higher education institutions that seek to promote intercultural practices. Also, primary and secondary military institution could benefit from a multicultural perspective for peace approach in school settings so as to promote plurality and mitigate violence.

In this direction, we point out that studies we already presented at Peace Education SIG in previous years proved the challenges military institutions – from primary/secondary school to higher education institution as well as a peacekeeping instructional center – have been facing to deal with the needs of contemporary environments.

Recommendations to the field would include the need to explore the nature and meaningfulness of education provision and restraining factors in military schools, academies and colleges as well as their motivations, resistances to operate in multicultural and clashing societies and their claim to cooperate with civil higher education institutions, so as to overcome militarization criticisms and join efforts that seek to provide defense, security and peace for societies, essential for building better and sustainable futures.

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Social Inclusion of Foreigners in Poland

Abstract

Poland has a relatively short history of immigration compared to other member states of the European Union. However, in recent decades, the number of foreigners in Poland has increased significantly. Intercultural relations may take the form of hostility, conflict, antagonism, segregation, separation, neutral co-presence, partial social adaptation, avoidance, withdrawal, alienation, marginalisation, integration, assimilation or acculturation. This paper is dedicated to an integration model. The author describes the phenomenon of migration and social inclusion of foreigners in Poland. The author also distinguishes factors and entities, which are important for the process of social inclusion. At the end of the paper the author highlights the different needs of Polish society. They cover, dialogue with foreigners, the creation, and an increase in social awareness, of an integration policy for foreigners learning about multiculturalism and allowing foreigners the opportunity to participate and play active roles within all areas of Polish society.

Keywords: social inclusion, integration, migration, foreigners, intercultural relationships, Poland

Introduction

Poland has historically been primarily an emigration country. Recently, however, Poland has been changing into an emigration-immigration country with the latter being boosted by European Union membership and the strong, stable growth of the country's economy. In the last few years, immigrants have started to play an important role in the Polish labour market, which creates an additional challenge for its institutionalised structure. At the same time, the institutional framework for receiving immigrants, especially integration policy, has not been fully developed yet (Duszczyk & Góra, 2012). It is addressed only to refugees and repatriates and is provided mostly by NGOs who run various integration programmes (most often focused on providing them with language courses). Public expenditure on integration policies has recently increased. However, data on immigrants, analysis of integration and progress on an immigration policy are still close to non-existent. Perhaps, with the current refugee problem in Europe, Poland will begin to create the required reforms and processes needed for effective immigration policies.

Generally, foreigners can be identified from five main groups in Poland. These represent foreigners coming from:

- The European Economic Area and Switzerland;
- The OECD member states (except for the European Economic Area and Switzerland);
- Poland's Eastern neighbouring countries (Belarus, Ukraine and Russia);
- Far East countries (mostly Vietnam and China);
- Other regions.

The reasons for immigrating to Poland are homogeneous with those for migrating to other countries. First of all, foreigners are looking for “a better life”, resulting in finding work, being allowed to study or reunited with their family. Therefore, at the beginning it is worth analysing the phenomenon of overall migration.

Migrations in Europe

The first of May 2004 marked an important date in the history of Europe as a political, geographic, and social entity. Ten European countries joined the European Union, bringing in their potential and expectations, adding a total population of 75 million people and a territory of 738,000 square kilometers. The EU-25 consists of 452 million citizens.

The main question is: why do people migrate? The answers could be one or more of: to be reunited with family, work to support their family, flee war or other dangerous situations back home and seek freedom and safety in other countries, pursue their faith or to simply seek fun and adventure.

For centuries, European migration patterns consisted mainly of movement around the continent, or away from it. Millions tried to flee religious persecution. Others were driven by hunger and poverty, including impoverished southern Europeans (Barter, 2002).

In the years 1950-1960 workers arrived in their millions to fill the gaps in European labour markets. National policies were fairly liberal, resulting in a lot of foreigners coming to Europe from overseas territories, often with previous colonial and other historic ties. Immigrants from West-Indies and India went to the UK, Algerians and Moroccans to France, and the Netherlands with large numbers of Turkish heading to Germany. During those years, the contacts between Turkey and Maghreb were initiated. The migration from South-European countries to North Europe also began.

The numbers peaked in the early 1960s, creating a net European migration figure, which is far higher than today's. These immigrants, mostly non-white, were not expected to stay.

Policies became restrictive from the 1970's on, due to a saturation of the labour market. In 1973, migration stopped and in the 1980s there was a period of recession. Some possibilities, however remained; family reunification, studies or seasonal work. This forced the asylum system to carry the weight of the migration wave. The 1980's also brought about the accession of the South-European states, such as Greece, Spain, and Portugal, who initially faced immigration restrictions on their people.

In the 1990s Germany had the largest influx of migrants, while the United Kingdom was second. By 2000, many governments had revised their policies, in order to adjust to the changing employment and demographic requirements. In 2002, they started investing in return programmes.

Immigration policy of the European Union

The pressure to move from developing countries is being perpetuated by Europe's own policies. The EU's protectionism, agricultural policies and subsidies

are all contributing to making life tougher for the developing world, increasing the pressure for people to leave.

There have also been other problems, such as smuggling and trafficking networks, striking a balance between security and the basic rights of individuals and a country's historic relationship with minorities and policies for them.

The European Council (1999) held a special meeting on 15th and 16th October 1999 in Tampere focusing on freedom, security and justice in the European Union. The European Council established a common EU asylum and migration policy, which consists of:

- A comprehensive approach that finds a balance between humanitarian and economic admission;
- Fair treatment of third country nationals: to give them comparable rights and obligations to those of nationals;
- Development of partnerships with countries of origin, including policies of co-development.

Communication from European Commission (2000), recommending a common approach which should take into account:

- The economic and demographic development of the union;
- The capacity of reception of each member state, along with their historical and cultural links with the countries of origin;
- The situation in the countries of origin and the impact of migration policy on them;
- The need to develop specific integration policies: based on fair treatment of third-country nationals, the prevention of social exclusion, racism and xenophobia and the respect for diversity.

In the last 10 years, immigration to the EU has increased, due to demand for skilled and un-skilled labour and a low birth rate in the EU. Both the UK and Germany have announced schemes to attract more skilled immigrant workers.

A communication from the European Commission (2008) states that integration is really the key to successful immigration. Integration as a "two-way process" should be promoted, conforming to the Common Basic Principles on Integration. The participation of immigrants should be enhanced, while social cohesion and approaches to diversity in the host societies should be developed. To this end, the EU and its countries should:

- consolidate the EU framework for integration;
- support the management of diversity and the evaluation of the outcomes of integration policies in EU countries;
- promote integration programmes targeted at new immigrant arrivals;
- ensure equal advancement opportunities in the labour market for legal non-EU workers;
- apply social security schemes equally to immigrants and to EU nationals;
- develop means to increase the participation of immigrants in society;
- continue applying the EU asylum policy, while developing the measures further, in particular, through the Policy Plan on Asylum.

Since Poland became a member state of the European Union, the government has adapted its migration policy to EU standards.

Foreigners in Poland

Poland, which is geographically located between Eastern and Western Europe, generally used to be considered as a transit country by immigrants from outside the EU. However, it remains one of the few member states of the European Union that has not fallen prey to the recession and continues to show a positive economic growth trend. This has led to a change in perception among foreigners and Poland is now considered an attractive opportunity.

Poland has a relatively short history of immigration compared to other European Union members. The communist regime prevented the processes of immigration by a restrictive migration policy, making Poland an example of ethnic homogeneity. The above-mentioned historical factors have shaped contemporary Polish society's perception of migration and immigrants in general.

The information about the number of foreigners in Poland is provided by the organisation named Hafelekar. In cooperation with the European Union Foundation, "Leonardo da Vinci" and "Job-in-a-job", Hafelekar (2016) created a "Report about immigrants in Poland". It concluded that, the main countries from which foreigners came to Poland are the countries of the former Soviet Union (Ukraine, Belarus and Russia). A relatively large group of immigrants to Poland are citizens from developed countries, such as the USA, Germany, France, and Vietnam. Every third foreigner living in Poland comes from one of its neighboring countries. The most immigrants came from Ukraine (26.6%), with a large number of people coming from Belarus (9.2%) and China (4.2%).

There are two important characteristics of immigrants living in Poland. Firstly, they are generally very well educated (36% university graduates) and, secondly, they are people of working age (80% are aged between 20 to 59 years). This means that active people migrate to Poland with the majority of them being men. Immigrants from different parts of the world tend not to settle in the same Polish regions. Immigrants from Western European countries and the United States live in Warsaw, Krakow and the surrounding area. Immigrants coming from countries of the former Soviet Union primarily live in the eastern provinces. The biggest group of immigrants resides in the Mazowiecka province (30%), the Małopolska province ranks next, followed by Lower Silesia and Lodz. Approximately 83% of all immigrants live in cities (Hafelekar, 2016).

Social inclusion

R. Penninx (2003, p. 1) claims that, "Integration is the process by which immigrants become accepted into society, both as individuals and as groups. This definition of integration is deliberately left open, because the particular requirements for acceptance by a receiving society vary greatly from country to country. The openness of this definition also reflects the fact that the responsibility for integration rests not with one particular group, but rather with many factors—immigrants themselves, the host government, institutions, and communities, to name a few". Integration is also defined as the social coexistence that brings about racial desegregation, equal opportunities regardless of race and cultural origin. The nature of the process is quite complex and may appear in many aspects (structural, cultural, social etc.) affecting both immigrants and the receiving society.

The government supports pro-immigrant initiatives. Many information campaigns and educational activities are organised in order to promote tolerance and respect for cultural and national identity (Matysiewicz, 2012).

The key government strategic document covering the issue of immigrant integration, “Migration Policy of Poland – Current State of Play and Further Actions” was elaborated on by the inter-ministerial Committee for Migration in July 2011 and then adopted by the Polish government in July 2012. In December 2014, the action plan to this document was developed by the Committee and was approved by the Polish government. It specifies ways to implement the recommendations contained in the document, costs, sources of financing, responsible institutions and deadlines for implementation. The majority of actions, which address the recommendations concerning integration, are due to be completed by the end of 2016.

Despite the adoption of the strategic document, Poland’s integration policy may still be regarded as under developed. Polish state institutions are obliged to provide special integration support and services to repatriates and foreigners who have been granted international protection. However, for the other categories of third country nationals, state institutions are not obliged to provide any integration. This task is left to non-governmental organizations which rely on external sources of financing.

NGO activities are highly dependent on the availability of EU funds. Without this external funding, the majority of integration projects in Poland targeted at third country nationals, especially those not under international protection, could not be implemented (Stefańska, 2015). Unfortunately, the government’s strategic documents do not provide for alternative sources of funding for them. Such a situation does not guarantee stability and continuity for these organizations’ actions.

In Poland there are many independent non-profit organisations whose collective mission is to develop an open and diverse society. They aim to do this through supporting intercultural dialogue and social integration, challenging discrimination, increasing knowledge and developing tools that strengthen social integration and equality, as well as empowering social minorities, migrants and migrant communities.

Some of the NGO’s are also engaged in critical analysis of the history of social diversity in Poland, so that past experiences can provide constructive insight into the current debate about contemporary issues related to migration, equality and social inclusion.

Polish NGO’s works toward a vision of society in which every person feels free and safe, can develop and participate in social life in accordance with their needs and ambitions, independent of who they are or where they come from. A society where social diversity is respected, valued and nurtured.

E. Sowa-Behtane (2013) analyses her own research, which investigated the integration of foreigners who are in relationships with Polish nationals and living in Poland. The author identified that the factors important in the process of social inclusion are:

- life plans foreigners (whether they are related to the Pole),
- knowledge of the Polish language,
- knowledge of the country of residence,
- employment,

- participation in the traditions of the country,
- ability to practice their religion and their traditions,
- participation in the Polish cultural life,
- participation in social networks,
- no discrimination from locals,
- perception and opinion of Poland.

The studies has shown that, a foreigner whose life plans are related to the Pole (wife, cohabitant), who speaks Polish, who has knowledge about Poland, who is employed, who participates in Polish culture, traditions and social networks, who is able to practice their own religion and traditions, who is not discriminated by the locals and who has positive opinion about Poland, is best positioned for a fully immersive social inclusion.

As part of the social inclusion process, the following entities also need to be supportive: nursery/kindergarten/school, language school, labor office, employer, volunteering, NGO, office of the city/municipal/district, social welfare center, county family support center, health clinic, tax office and police (Sowa-Behtane, 2012). If all the entities become empathetic to the strategic and tactical requirements for social inclusion, then the integration of immigrants into Polish society will have a positive ending.

Conclusion

Poland is among one of the countries tied to the international movement of populations, therefore, it is also affected by various migration issues. These, in turn, have an impact on society at many levels. Hence, it must move towards dialogue with the foreigners who have arrived, so that, with proper diversity management, there is an opportunity to build inclusive communities together. These can be characterised by the eradication of any social distance between groups, as well as related prejudices and discrimination. In pursuing this intention, social inclusion becomes a key tool, which allows social groups of differing ethnicities, cultures and religions to include them in the host society.

Thus, there is a need for the proper creation of an integration policy for foreigners and for an increase in social awareness in Polish society. Firstly, this translates into the recognition for the need of proper planning and the undertaking of activities related to the phenomena of migration and integration, their dynamics and related processes. Secondly, the pre-migration personal situations of foreigners, as well as the economic and political fabric of the host country, must be considered.

Finally, we must remember, that by including foreigners, we are also helping ourselves improve our everyday living environment. If we brand them as “outsiders”, so shall they likely remain, not only within society but also personally. We will feel this in the quality of our everyday existence which, looking forward, will inevitably become more and more multicultural. Thus, in seeking the creation of a successful Polish immigration policy, we must learn to adopt a positive multicultural attitude and allow foreigners to be accepted as valued members of Polish society.

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Maria Dishkova

An Autistic Child Would Like to Say “Hello”

Abstract

There is so much information about autistic children in educational theory. And there is not so much know-how in educational practice. This statue is about science research which main goal is to prove that autistic children and their families shouldn't be isolate by society because it is the worst way to be supported. There are many options now for children with SEN (special educational needs) and they have law-defined rights that must be followed. Options must be used by parents, families and relatives, so they to be better care-givers for diagnosed child. Research shows that social isolation gives negative results and must be avoided.

Keywords: autistic child, autistic spectrum disorder (ASD), early intervention, children with special educational needs (SEN)

Introduction

Imagine a life without being able to express yourself: your need, your dreams, your thoughts, your feelings, your wishes. Imagine a life in which you are not capable to make a contact with others, with people around you; and you are not capable to share your head's content with them. Imagine an endless isolation and reason for that is unaccountable for people around you are you are not able to explain what happens in your heart. Imagine an endless need of help with no ability to ask for her.

A world in a world: this is the life of an autistic in our lives. It is like living on another planet or on a lonely island and it is not possible to be reached. It is like an extra-terrestrial coming on earth and wanting to say “hello” but doesn't speak human language. When you are looking at an autistic may be you are thinking that they look happy on their well protected island, they don't look like feeling lonely, and they don't look like being sad because of luck of friends. But definitely needs help and support. It is a fact that the number of autistic children increases with every day now.

Childish autism is a bad diagnosis about child and about its family. They begin a life in double isolation. Once it is an isolation defined by diagnosis. And second it is isolation from society that doesn't like different people.

The word “autistic” is first used by Eugen Bleuler in meaning of “social withdrawal” when he is looking at group of schizophrenics. Later both Leo Kanner and Hans Asperger, independently of one another, use the same word with no meaning schizophrenics (Dimitrova, 2012, p. 53). Leo Kanner meant to describe a group of children which he was observing. The word autism means “alone” (from Latin). The group of children Kanner had observed had a preference to be alone (Koegel & LaZebnik, 2004). In 1944 Hans Asperger made another research that includes observation of four boys with strange behavior and abilities. He defined their behavior as “autistic psychopathology” – a condition that has some specific features: lack of empathy; low abilities for making friends; monologue speech

without searching to a real communication; limited and specific interests; clumsy movements (Dimitrova, 2012).

The words “spectrum disorder” has been added later onto the term “autism” because children can have a wide range of symptoms or characteristics. They could affect them that range from mild to severe (Willis, 2006).

Autism spectrum disorder could be described as a complex developmental disorder that affects someone’s ability:

- to socialize;
- to communicate;
- to respond to environment.

One of the most severe disabilities that reach young children is autism disorder. This is a disorder that affects almost every aspect of the child’s development (Benson, 2006). Some specific features of autistic spectrum disorder are: there is no speech at all, or speech is not adequate to age; child doesn’t fix his eyes – it seems like he/she is looking through us; child doesn’t respond to the emotion of human in front of him; child doesn’t respond with face and mimics; child has no imagination; child has no interest in playing with other children at the same age; child doesn’t include in other’s children playing; not able to work in team; doesn’t seem to feel pleasure; doesn’t try to get attention of adults; child has unusual and repetitive movements; has unusual fears (Stankova, 2012a, pp. 76-77).

“Autism is identified by two primary diagnostic markers: difficulties in social communication and restricted or repetitive behaviors and interests” (Wong et al., 2014). Usually starts from the first year of child’s life.

Children with ASD often have symptoms of other psychical disorders as behavior difficulties, aggression, auto-aggression, hyperactivity and anxiety. Anxiety is very interesting about scientists because it seems to be connected with basic symptoms. Any change of environment and any interruption of stereotypical behavior could increase anxiety, pressure and emotional stress in children. Another hypothesis is that repeating one and the same makes children calmer (Stankova, 2012b, pp. 138-139).

It should be said that early intervention is completely required if we want to get any positive results and significantly positive effect on long-term outcomes for children with ASD (Autism Spectrum Disorder). It is exactly early identification that is a key to early intervention. Early signs of autism are often noticed by 18 months of age, or even earlier. Some early signs or “red flags” that a child may have an ASD include the following:

- lack of or delay in spoken language;
- repetitive use of language;
- little or no eye contact;
- lack of interest in other children;
- lack of spontaneous or make-believe play;
- persistent fixation on parts of objects;
- poor response to his/her name;
- fails to imitate caregivers;
- motor mannerisms (hand-flapping);
- fails to point or show joint attention (Lindgren & Doobay, 2011).

Here it is the right formula: early diagnosis leads to early intervention that leads to optimal development of children with ASD.

“Appropriate treatment of ASD should begin with a careful assessment to determine the child’s specific strengths and needs. There are no specific medical tests for diagnosing autism although there are genetic tests for some disorders that may be associated with behaviors on the autism spectrum. An accurate diagnosis is based on systematic interviewing, observation, and assessment of the child’s communication, social interaction, behavior, and developmental level. In addition to assessing the key symptoms of autism, a review of sleep, feeding, coordination problems, and sensory sensitivities is often recommended. Medical factors that may be causing pain or irritability should be recognized and treated whenever possible” (Lindgren & Doobay, 2011, p. 7).

Each person, each child, each social-pedagogical case, and each child with ASD is different. All these are unique. So plans for intervention must be individualized. They must be based on the needs of the individual and family. Early intervention can achieve significant result in improving cognitive and social development for children with ASD (Lindgren & Doobay, 2011). Some children with ASD are very well affected by components in “sensor room”: they become more concentrated, calmer and purposeful (Boycheva, 2013, pp. 189-193).

“The call for the use of interventions that have proven their effectiveness is particularly important for the ASD community, which has long been plagued by the use of unsupported and often controversial interventions. In fact, it has been suggested that the uncritical use of unproven “miracle” interventions has encouraged unrealistic, implausible, and unhealthy expectations about treatment results and have ultimately impeded the progress of identifying effective interventions for children and adolescents with ASD” (Simpson, 2005, p. 140).

All these words above have provoked a research about the necessity of social-pedagogical intervention to autistic children.

Research methodology

Hypothesis of research is that social isolation is critical about a child with autism and its family. There are so many options for intervention today. It is hard to say that all of them are effective and useful; or some interventions are working to a child and other interventions are not working to a child. It is usual practice in social-pedagogical work: there is no universal medicine for all people and for all their problems. But there is always a hope. That is why someone should search ways to help and a person with problems should allow to be helped by someone.

Main goal of research is a comparison to be made between two groups of children and their families:

1) First group are children with autism which are object of professional interventions, made by different specialists. And their families are getting professional help as well.

2) Second group are children with autism that are “under home arrest”. They are not object of professional social-pedagogical help. And their families are “under home arrest” as well and don’t get any help.

Some concrete tasks are completed because of this main goal:

- following the condition of an autistic child that has been working with by specialists;
- following the condition of an autistic child that hasn't been working with by specialists;
- comparing both above;
- following the condition of an autistic child's parents that has been receiving professional help;
- following the condition of an autistic child's parents that hasn't been receiving professional help;
- comparing both above.

Object of this research are 20 children diagnosed with disorder of the autistic spectrum. They are separated in two groups:

- a) ten of these children are have been visiting a daily center for one year in specialized institution. This daily center is licensed to work with autistic children. They have permission from Direction "Social Assistance" (Department of Child Protection) and they get this help absolutely free. In this daily center children are object of different kind of interventions – they meet social worker, psychologist, art-therapist, music-therapist, speech therapist. They get medicine help if necessary as well. Different interventions are included in their daily program according to their age, individuality and common condition. They follow special diet and way to feed. Meeting between specialists and parents are organized as well, aiming interaction and cooperation. This group of ten autistic children is in this social service from one year till now and continuing. Five of these children are visiting public school and they are evaluated as children with SEN (special educational needs);
- b) the other ten of these children are growing at home only by their parents and families. They don't get any kind of help and their parents don't get any kind of support. These children and their families have no contacts with environment. They communicate with no one. These are families in which mother is unemployed to be able to take care of child 24-hours in day. She almost has no friends and begins to see everyone as mocker or even enemy. Children don't visit kindergarten, school or any other forms of education.

Subject of research are all activities which autistic children are taking part in or are not taking part in. Subject of research are all results (positive and negative) of working or no working with autistic children and their families.

Results

It is one year now from beginning of research and some results could be published, because they show difference clearly between two groups of examined children. Hypothesis of research is that social isolation is critical about a child with autism and its family has been confirmed. There is still no universal strategy for social-pedagogical intervention that works the same in all cases of child with autistic disorder. And there are still many children that don't point progress. But it is clear that is better to receive professional help than not to get. It is the same with parents as well. Results of research show that they become more optimistic and much more

able to care adequately after their kids. Level of stress is getting lower. Depression is almost overcome. Mothers have some time to rest and then to be better mummies of children, because they need all mother's time, energy and strength.

Children meet more people. They become less isolated. Learn new words or ways to express themselves. They receive the possibility to find their talent and many of them are in possession of talent to exhibit.

On the other side are children staying at home. They are absolutely besides any help, support, professional advice and intervention. Parents are angry and hopeless. They don't have goals and they don't believe in future. Sadness and depression are their best friend now. No others. No progress in child development; often regress is pointed.

Conclusion

When I first made a research about autism it was in years of 2001-2002. There was no information about autism in Bulgaria then. Children with autism were diagnosed with different disorders of development and have received inadequate or no support and help. Some of them have visited special schools along with other children with different diagnosis. In these schools autistic children were fated to total regress. Other children were closed at home, most in country. There were no books, only Internet sites full of international experience. It was very interesting to compare good practices and strategies of specialists from other countries and our national experience, or lack of experience in this area.

Today, almost 15 years later practice is very different and world of science is optimistic. In Bulgaria there are a lot of possibilities for children with autism: teams of specialists, daily and weekly centers for care and education, special diets, different educational programs, specialized projects, sensor rooms, smart TV, exchange of experience with other countries, association of parents, groups of each other support, government and non-government organizations, laws and rights for children with SEN, resource teachers, multidisciplinary team at schools, including psychologist and speech therapist. There is hope and there are so double checked advices for optimal development of an autistic child:

1) Autistic child should be professionally helped and supported so to be able to say "hello" and to feel comfortable in our world. There is still no one opinion on strategies used in practice. But there is one opinion that it is compulsory to have strategies and to be practiced as well.

2) Autistic child's parents should be professionally helped and supported so to be able to look after their child adequately and in best possible way. After hearing the diagnose most of them came into a condition and really need help to overcome it. They need support to face, to accept and to manage problem. They have to be supported to support their children. They have to be educated how to educate them. But first of all they have to be convinced to confess that they and their child have problem.

3) Child with autism look like living in a box or a room without doors in and out. This room is of glass. And all people around are able to see what is doing child inside but no one could get in. Child could not get out as well. Specialists' task is to find a door: a door to pass through, to get in and to make contact with child; and a door out to help child to join our world. If room stay closed it will deep child's

problems. And shouldn't be forgotten that he/she will not make first step outside alone, because he/she:

- don't want to do that;
- is not able to do that;
- don't know how to do that.

4) Society in common should be informed and prepared to meet and to accept different children and different people. Rights of children with SEN must be promoted in society. It is not just a law to be written – it is not enough. Rights of people should be known by other people. This is first step to a law obeying. And children with SEN should be more protected by law, because initially they are more unprotected.

5) ASD are unique in his specifics and expressions. So it is necessary to be affected by not always standard methods for intervention. It must not be expected that a regular teacher in public school will manage to fix and to overcome problems in classrooms. **Wrong intervention is worse than no intervention!** Patience in meeting a child with ASD is compulsory more than other social-pedagogical case or problem to be solved. Main goal is not to cure ASD, but to make child more independent and to integrate him/her in social life as much as possible.

6) Situations are difficult for the other family's members as well. Children with ASD may have brothers or sisters that are not affected by illness. They have to be under psychological help for two reasons: first to manage problem and second to be support for the child with ASD. There are many cases when father or even mother has no strength to accept diagnosis and leave family or leave the child for governmental care. Here another problem occurs: economical. If father leave family and mother is forced to stay at home and not to work money become not enough and this affects every member of family.

7) Methodology used in current research include different methods for intervention. Its goal is not to define most efficient of these methods, but to prove that intervention is compulsory. Every child affects in different way by different methods. But staying at home and hiding from society is never a good way to meet problem.

It must be clarified that research is continuing now and will achieve more specific results. They will be shared in further publications and statues. Science must not be silence on this topic and new methods for intervention should be found because these kind of children desert every effort made for them.

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Research Approaches for Higher Education Students: A Personal Experience

Abstract

Conducting research can present a range of challenges for students because of the complex skills and knowledge required to have critical engagement with the entire research process. This paper looks at what was involved in shaping the research journey that I am currently undertaking at a Higher Education Institution (HEI). The focus is on research methodologies. The purpose of this paper is two-fold: (1) to describe the study's data-collection methods and the theoretical concepts that motivated the selection of the said methods; and (2) to relate how the research methodology is related to my personal experience. The paper employs the work of experts in qualitative and quantitative approaches, along with related literature as resource for the content material. This piece of work is considered relevant because Higher Education (HE) students are undertaking similar research projects and can therefore benefit from it by taking into account the knowledge and skills that I have gained. The paper emphasises the link between academic theory and professional practice especially in the case of action researchers. The paper ends with a reflection on lessons learned and how these have informed my work as a practitioner researcher.

Keywords: research approaches, higher education, qualitative and quantitative research, mixed methods, action researcher

Introduction

Research work involves many processes and procedures, including theoretical stances, the methods that are used for data collection and how the data collected are interpreted and analysed (Creswell, 2014; Bryman & Bell, 2011). The focus in this paper is on some of the procedures that are involved in the research process, including the various theories that underpin research practice. Although the paper does not give an in depth discussion of research design, data collection and analysis procedures, it explains how they are linked to theory. It discusses the nature of research and identifies the approaches that are used for research activities. The paper draws on scholarly work of researchers and experts in qualitative and quantitative approaches, to provide the content material and to show how theoretical assumptions guide the research process. It also demonstrates why Higher Education (HE) students should give consideration to qualitative and quantitative approaches when planning to carry out their investigations. It concludes by presenting the insights gained from engaging with literature that explains and analyses how research really works – all that is involved at every stage of the research journey. The paper begins by looking at the context and rationale for this paper.

Context and rationale

The boundary that frames the context for this paper is the doctoral study that I am currently undertaking in a Higher Education Institution (HEI). To carry out this research it was necessary for me to explore the research literature to determine what

theories support my work and what the experts have reported about research procedures and processes. My research focuses on evaluating and determining service quality at a private higher education institution in the UK. The overarching question that guided the study is:

How does a private educational institution use service quality to enhance students' educational progress?

The above question was constructed based on the nature of the study and the theoretical positions that underpin qualitative studies. Taking this stance helped me to make informed decisions about employing a qualitative approach. As an action researcher, I am positioned in the discussion as regards methodological approaches, choices and decisions. However, the purpose of this paper is not to present hardcore methods but rather to explore all that is involved in investigating a particular phenomenon - how the research is conducted, when to carry out specific tasks, what kind of literature to review and why research procedures are necessary to carry out investigations. The two-fold aim of the study is: (1) to describe the study's data-collection methods and the theoretical concepts that motivated the selection of the said methods; and (2) to relate how the research methodology is related to my personal experience. The paper describes how I utilised the literature to guide my actions in carrying out the investigation. It further demonstrates the research path I have taken in order to get the post data-collection stage of my work. It was this challenging and interesting journey, along with the exposure to all sorts of research possibilities that inspired me to write this paper. Before turning my attention to the three main research approaches, I will briefly review the nature of research design and approaches.

Research design and approaches

The procedures adopted for the collection, analysis, interpretation and reporting of research data is basically known as research design. They represent different models for doing research, and these models have distinct names and procedures associated with them. Shukla (2008, p. 29) defines research design as "a plan of the method and procedures that is used by the researchers to collect and analyse the data needed". Having learned what research designs are purposed to do, I was able to identify my research questions, select the method used to help me to find answers to the questions and determine my sampling methods and procedures. As such, the research design served as the blueprint that articulated and illustrated the sequence for my research activities. Shukla (2008, p. 29) names two kinds of research designs in relation to the distinction between qualitative and quantitative approaches, namely, exploratory and conclusive.

Quantitative and qualitative approaches

Qualitative and quantitative research use different approaches. The former research is of a subjective nature and the latter is concerned with objectively measurable variables. Creswell (2009, pp. 207-208) compares both approaches:

Qualitative

- Multiple realities
- Reality is socially constructed
- Reality is context interrelated
- Holistic
- Strong philosophical perspective
- Reasoning is inductive
- Discovery of meaning is the basis of knowledge
- Develops theory

Quantitative

- Single reality
- Reality is objective
- Reality is context free
- Reductionistic
- Strong theoretical base
- Deductive and inductive
- Cause and effect relationship are the basis of knowledge
- Tests theory

As noted above, qualitative research is more subjective. However, it also supplies a way to examine variables in their natural setting as opposed to the clinical conditions required in quantitative research methods. Reviewing the foregoing comparison has equipped me with a sound understanding of how each approach contributes to research investigation. Employing a qualitative approach was a direct result of the knowledge I gained.

Mixed methods

The Mixed Methods approach is defined by Tashakkori and Teddlie (2003, p. 711) as "... a type of research design in which QUAL and QUAN approaches are used in types of questions, research methods, data collection and analysis procedures, and/or inferences". Creswell (2009, pp. 207-208) explains this approach as follows: "The qualitative and quantitative data are actually merged on one end of the continuum, kept separate on the other end of the continuum, or combined in some way between the two extremes". Punch (2005, p. 238) notes that using both approaches in terms of the choice of methodology, an important question to ask is: what, exactly, is the researcher trying to find out? I questioned the purpose for my research. A thorough examination revealed that a mixed methods approach was not suited for my study since I was not aiming to obtain a precise measurement of attitudes and outcomes (Lodico et al., 2006, p. 17).

Philosophical assumptions

Over the years, there has been continuous development of research worldviews in the fields of social science and studies on educational research. Researchers such as Wisker (2008), Onwuegbuzie and Leech (2005) and Creswell (2009), have provided different accounts of the beliefs of researchers. Below are some of the philosophical positions that researchers take:

- Positivism
- Post-positivism
- Social Constructivism
- Pragmatism

A discussion of the above positions gives rise to what Blaikie (2000) describes as the 'research paradigm'; others research to this as 'research philosophy' (Saunders, Lewis & Thornhill, 2007). These philosophies are formed from basic

ontological and epistemological positions, and have developed in both classical and contemporary forms to effectively classify different research approaches. Denzin and Lincoln (2003) describe a research paradigm as ‘an interpretive framework’ and as a ‘basic set of beliefs that guides action’.

I found learning about philosophical assumptions both challenging and interesting. Getting the gist of what each represents and how each is applied to the research process was not a simple task. It took several readings, note-taking, checks and intense analysis before I was able to see their relevance to my research. I found Creswell’s explanations, examples and illustrations quite useful in helping me to make the appropriate links and see how my worldview is related to my study (2014). Even the methods that I used were linked to the constructivist worldview that I eventually selected Wisker (2008, pp. 68-69). Creswell illustrates how worldviews, strategies of inquiry and research methods are interconnected. Positivist, constructivist, transformative and pragmatic worldviews form part of Creswell’s framework. The designs that he identifies are qualitative, quantitative and mixed methods and the research methods are questions, data collection, data analysis, interpretation and validation (Creswell, 2014, p. 5).

Having a philosophical worldview helped me to gain a “deeper and wider perspective of research”, which helped me to focus my aim and put my research in a wider context Carson et al. (2001, p. 1). Having decided on a theoretical position, I identified and justified the constructivist philosophical position taken, after an analysis of those noted below:

Positivism: This is based upon values of reason, truth and validity and there is a focus purely on facts, gathered through direct observation and experience and measured empirically using quantitative methods – surveys and experiments - and statistical analysis (Blaikie, 2010; Saunders, Lewis & Thornhill, 2007; Eriksson & Kovalainen, 2008; Easterby-Smith, Thorpe & Jackson, 2008). Hatch and Cunliffe (2006) relate this to the organisational context, stating that positivists assume that what truly happens in organisations can only be discovered through categorization and scientific measurement of the behaviour of people and systems and that language is truly representative of the reality. Positivist philosophy holds that all true knowledge is scientific, determined by fixed laws, and is best measured and known by the scientific approach.

Post-positivism: Post-positivist philosophy concentrates on finding out and determining the particular cause that leads to determined outcomes. This philosophy is also steeped in the specification of ideas into smaller and more manageable ideas that can be tested. The post-positivist assumptions have represented the traditional form of research, and these assumptions hold true more for quantitative research than qualitative research (Bryman & Bell, 2011; Tashakkori & Teddlie, 2003). This worldview is sometimes called the scientific method or doing science research. It is also called positivist / post-positivist research, empirical science, and post-positivism. This last term is called post-positivism because it represents the thinking after positivism, challenging the traditional notion of the absolute truth of knowledge and recognizing that we cannot be ‘positive’ about our claims of knowledge when studying the behavior and actions of humans.

Social constructivism: The notion social constructivism articulates that people construct or build knowledge meanings by means of their experiences and

interactions with other people, events and things in general. It is predominantly based on the assumption that the world is all about how people understand it from their work and living experiences. This position is described by Hatch and Cunliffe (2006) as anti-positivist and by Blaikie (2000) as post-positivist since it is contended that there is a fundamental difference between the subject matters of natural and social sciences.

Pragmatism: The pragmatist philosophy is based on the believe that world should not be seen as absolute and this paradigm was propounded by American researchers concerned with determining and identifying what actually works (Lodico et al., 2006, p. 9). Proponents of this worldview predominantly concentrate on the results of their research. This implies that they will depend on the knowledge emanating from their research into a particular phenomenon in order to determine what actually works in a given situation. Pragmatists further posit that if a theory achieves a specific outcome or reduces doubt about the outcome relating to a given situation, then it can be accepted as a good theory.

Research strategies

An effective research strategy helps the researcher to define the reasons behind using particular data-collection methods to support his arguments (Saunders et al., 2007). The strategies I used for my research were influenced by Creswell's (2009) five traditions of qualitative inquiry – ethnography, grounded theory, case study, phenomenology and narrative research. Analysing these traditions proved to be rather useful in helping me to decide on the most appropriate data collection for my study:

- **Ethnography:** A strategy of inquiry in which the researcher studies an intact cultural group in a natural setting over a prolonged period of time by collecting primarily observational and interview data. The research process is flexible and typically evolves contextually in response to the lived realities encountered in the field setting.
- **Grounded theory:** For this mode of inquiry, the researcher derives a general, abstract theory of a process, action, or interaction grounded in the views of participants. This process involves using multiple stages of data collection and the refinement and interrelationship of categories of information. Two primary characteristics of this design are the constant comparison of data with emerging categories and theoretical sampling of different groups to maximize the similarities and the differences of information.
- **Case studies** are a strategy of inquiry in which the researcher explores in depth a program, event, activity, process, or one or more individuals. Cases are bounded by time and activity, and researchers collect detailed information using a variety of data collection procedures over a sustained period of time.
- **Phenomenological research** is a strategy of inquiry in which the researcher identifies the essence of human experiences about a phenomenon as described by participants. Understanding the lived experiences marks phenomenology as a philosophy as well as a method, and the procedure involves studying a small number of subjects through extensive and prolonged engagement to develop patterns and relationships of meaning. In

this process, the researcher brackets or sets aside his or her own experiences in order to understand those of the participants in the study.

- **Narrative research** is a strategy of inquiry in which the researcher studies the lives of individuals and asks one or more individuals to provide stories about their lives. This information is then often retold or re-storied by the researcher into a narrative chronology. In the end, the narrative combines views from the participant's life with those of the researcher's life in a collaborative narrative.

In applying the above tradition to my research, I found that in some respects they are all interrelated, yet with different contextual values. For example, I have chosen case studies, but realised that there are some aspects of phenomenology present too. However, I am still contemplating how I will address this link in my methodology chapter.

As an action researcher, I wish to make a brief comment about what action research entails. Action research is viewed as an emergent enquiry process in which applied behavioral science knowledge is integrated with existing organisational knowledge and applied to solve real organisational problems (Koshy, 2010; Wilson, 2010). It is simultaneously concerned with bringing about change in organisations, in developing self-help competencies in organisational members and adding to scientific knowledge. Predominantly, it works within a qualitative design (Koshy, 2010, p. 80). O'Leary (2004, p. 139) explains action research as: "a strategy that pursues action and knowledge in an integrated fashion through a cyclical and participatory process. In action research, processes, outcome and application are inextricably linked". Research activities for action research may have a classroom practice context or they may have an institutional focus context (Koshy, 2010, pp. 34-35), hence its suitability for my study. These processes, as explained by O'Leary (ibid), are the ones that are involved in my research:

- Addresses practical problems (the goal is to improve professional practice)
- Generates knowledge (to produce change and the enacting of change to produce knowledge)
- Enacts change (incorporate change into immediate goals)
- Is participatory (collaboration with practitioners and other stakeholders)
- Is a cyclical process (takes place as he knowledge emerges)

Finally, action research is an evolving process that is undertaken in a spirit of collaboration and co-enquiry, as is being done for this study.

Selecting theory and methods

As mentioned earlier, a researcher's choice should support his/her worldview, thus the qualitative approach used; and this allowed me to gain insight into my issue (Creswell, 2014; Denscombe, 2007). Unlike quantitative research, which is concerned with objectively measurable variables, qualitative research seeks to build a narrative about an issue by understanding it. While this means qualitative research is more subjective, it also supplies a way to examine variables in their natural setting as opposed to the clinical conditions required in quantitative research methods. This implies that it is of the utmost importance that there should be a match between the

research questions and the methods. I was guided accordingly in relation to choice of theory and methods.

Conclusion and insights gained

This paper provides a critical reflection of the methodological process that are useful in generating insights that guide researchers especially in the in the research design process. It provides the opportunity for the researcher to engage with the literature, challenge and critique the different views and most importantly to make choices and take a decision stand that best suits the researchers study and research context.

I found the research process quite useful in relation to gaining new knowledge, generating ideas that help inform my research design process and making informed decisions. Part of the new knowledge gained relates to my ontological (the nature of reality) and epistemological (knowledge) positions in this research. The discussion on these positions is reserved for a follow-up paper. The relevance of this paper lies in knowing what is involved in embarking on a research journey. HE students are undertaking similar research projects and can therefore benefit from this by considering the knowledge and skills that I have gained. What I found truly useful was to understand the inextricable relationship between philosophical worldviews, research strategies and research methods.

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Social Networks Use, Loneliness and Academic Performance among University Students

Abstract

The world is extensively changed by Social Networks Sites (SNSs) on the Internet. A large number of children and adolescents in the world have access to the internet and are exposed to the internet at a very early age. Most of them use the Social Networks Sites with the purpose of exchanging academic activities and developing a social network all over the world. But the excessive internet usage can lead to negative outcomes such as poor school performance, depression and loneliness. According to these findings, the main aim of this research is to investigate whether internet addiction is related to academic performance and loneliness among the university students. The Emotional and Social Loneliness Scale, Scale for Social Networks and a personal information sheet were administered to a sample of 120 (61 female, 59 male) university students. The results indicated that internet addiction was positively associated with loneliness among students. At the same time we found a significant positive relationship between social networks and loneliness, but negative relationship between social networks and low academic performance. There was no correlation between social networks, loneliness and high academic performance. It has been concluded that internet addiction predicts loneliness among university students.

Keywords: social networks, internet addiction, academic performance, university students

Introduction

It is known that communication connects people with one other. It enables collaborative activities that influence our way of living. Methods for communication are not stagnant, but rather change over the course of time as a function of technology development. People have shifted from exclusively face-to-face communication with individuals in immediate physical proximity to methods of interaction over great distances. For example, the advent of the telephone and the internet revolutionized interpersonal communication.

The world is changed by the internet in an extensive way. The internet became an important part of our daily life. Internet gives us many options of communicating, such as e-mail, instant messaging, chat rooms and social networking sites (SNSs). Kaplan (2005) describes it as a web-based service that gives individuals the chance to construct personal profiles and communicate with their list of connections. Social networks caused an increase of the live virtual communities through which people can communicate, share information and see each other.

There are some differences between social networks on the internet and social networks in real life. Social networks on the internet are more flexible than in real life. Some studies showed that it is easier to join social networks on the internet than to be included into groups and be effective in those groups in the real life (On, Chang & Wang, 2011). While social networks in real life include people who always meet each other and create strong connection, the Internet lets people who

have never met or seen each other be part and join the same networks. In addition, the internet makes communication easy via overcoming time and play limitations.

Today there are many popular social networking sites around the world such as Facebook, Twitter, My Space and Google Plus. The uniqueness of the social networking sites is providing users with the possibility to present them using their profile picture and personality information. It also allows users to express their feelings on the network. Social networking sites are only useful when people are really using them as application to stay connected with friends and family and share experiences, memories, happiness and sadness. However, it becomes dangerous when people are addicted to it.

Most of the networking site users are college and high-school students. College age users (between 18 and 25 years old) constitute the biggest age group, of approximately 30% of the total user population. One-third of the population of the social networking sites users are college students. The studies showed that a large number of children and adolescents in the world have access to the internet and are being exposed to the internet at a very early age. Common online activities include completing schoolwork, playing online games or reading and writing emails. The internet provides some educational benefits including access to information across a wide variety of topics, establishing educational links and communicating with peers. But excessive internet use can lead to negative outcomes such as poor school performance, social isolation, depression and loneliness.

The relationship between social networks and loneliness

Loneliness is a universal common experience. It has been described as a negative feeling that appears when there is a discrepancy between what one wants in terms of interpersonal affection and intimacy and what one, in fact, has. This discrepancy can result from the changes in the personal and social needs and desires (Weiss, 1973).

Loneliness has been defined as “the unpleasant experience that occurs when a person’s network of social relations is deficient in some important way, either quantitatively and qualitatively” by Preplan and Perlman (1982). According to the research findings, loneliness has a correlation with social skills of (Kaplan, 2005), introversion (Kraus, 1993), depression and anxiety (Fox et al., 1994), internet use (Kaplan, 2002).

According to researchers’ findings, social network using has a relationship with anxiety (Shapiro et al., 2000), introversion (Young, 2007), increased level of depression (Cao, Su, Liu & Goo, 2007), anxiety (Sealy, Phillips & Stevenson, 2002), daily life problems (Young, 2007), shyness (Ross, Orr & Orr, 2009), loneliness (Monahan-Martin & Schumacher, 2003).

Students who feel lonely use the social network mostly for communication purposes. Sometimes spending too much time on the internet leads them to loneliness. University students who are in the period of young adulthood are in need of developing close relationships.

Lonely students believe that they have problems regarding making friends, introducing themselves, joining groups and enjoying parties, so they have a high tendency for internet usage and at the same time they experience loneliness.

Researchers indicated that students who use social networking sites for a longer period of time had insignificant relationship and minimized the verbal communication to those who use them lesser (On, Chang & Wang, 2011). Today, traditional communication is neglected while benefits of the social networking sites have increased. Now it is clearer why depending of social networking sites too much might increase loneliness among young people.

Social networks and academic performance among students

Today, the process of education plays a vital role in building a modern society. Education is a unique investment of personal and academic performance. The theory and practice showed that the good academic record over the years predicts the future success of the person.

Studies have shown that the other variable related to the internet addiction is the academic achievement. Most of the students used the social networks to exchange academic activities and develop social network all over the world. They want to communicate and share their learning experiences with their peers. But some of them used social networking sites for fun, to play interactive games, visit unrelated websites and chat in chat rooms. All of these have been determined to impact the study habits of the students in a significant decrease in their academic performance. While some studies have indicated that spending long hours on the social networking sites leads to low academic achievement (Anderson & Dill, 2000), others state that there is a negative association between the internet usage or addiction and perceived impact on academic success (Anderson, 2001; Robles, McDaniel, Webb, Herman & Witty, 2010).

According to these findings, the purpose of this study is to investigate the relationships between social networks, loneliness and academic performance in Macedonian university students.

Methods

Participants

The sample of students was randomly selected and all of them participated voluntarily. Participants were 120 university students aged between 21-23 years. The mean age of the students was calculated as 21.50 (SD=8.97). Among the participants, 61 were female (51%) while 59 were male (49%). Study group of the research were third-year students who studied psychology at the State University of Tetova in Tetovo and Skopje.

Data collection tools

Within the scope of the study, Personal Information Form constructed by researchers, Loneliness Scale for determination of loneliness levels of students and scale for Social Network for determination internet and social network addiction status were used among university students.

Personal information form

This form includes gender, age and academic success.

Academic performance

Students were asked to self-report their grades during their studies at the University. Academic success level ranged from 6-10 and we divided students into two groups: 60 students with academic success lower than 7.50 ($M=7.08$) and 60 students with academic success higher than 7.50 ($M=8.36$).

Loneliness

The Social and Emotional Loneliness scale (SELS) was used. This scale, developed by Adorić Čubela and Nekić (2002), is used to measure general loneliness level. The scale was composed of 36 items (13 items for social loneliness and 23 items for emotional loneliness). It is a seven-point linker type scale. The total score range from 36 to 252, with higher scores indicating greater loneliness. In this study, Cronbach's alpha coefficient for internal consistency was 0.76.

Scale for social network (SSN)

The scale developed by Bodroza, Popov and Poljak (2004) was used with the participants. The scale aiming to determine internet addiction in students is composed of 42 items. It is a five-point linker type scale. According to the sum of scores, the range of total score is from 42 to 210, in which the higher score proves higher level of internet addiction. Internal coefficient of consistence (Cronbach's Alpha) was 0.82.

Data procedure and data analysis

Data collection tools were administered by the researchers during the winter semester of the 2015-2016 academic year. The instruments were applied to the students in classroom settings by getting permission from the instructors. The period for answering the scale lasted for 45 minutes.

The data was analyzed using SPSS 17.0 for Windows package program. In this study, the significance levels were accepted as .01 or .05.

Results

The results indicated that there was positive and significant relationship between internet addiction and loneliness ($r= .401$, $p< .01$) among university students. Also, the results showed that the internet addiction positively predicted emotional loneliness ($r= .330$, $p< .01$) and social loneliness ($r= .374$, $p< .01$).

There was a positive and significant relationship between loneliness and low academic performance ($r= .325$, $p< .05$), internet addiction and loneliness ($r= .600$, $p< .01$) and a negative and significant relationship between internet addiction and low academic performance ($r= .150$, $p> .01$). Also, in this group we found that the internet addiction positively correlated with emotional loneliness ($r= .299$, $p< .05$), but there was a negative correlation between internet addiction and social loneliness ($r= .250$, $p> .05$). In contrast, there was strong negative relationship between loneliness and high academic performance ($r= .112$, $p> .01$), internet addiction and high academic performance ($r= .002$, $p> .01$) and internet addiction and loneliness ($r= .009$, $p> .01$).

Discussion

The results of this study showed that there was a strong correlation between internet addiction levels of 21-23-years-old adolescents enrolled in the higher education process and levels of loneliness. According to this study, the usage of social networking sites is playing a significant role in causing loneliness in university students. At the same time, emotional and social aspect of loneliness was found to positively predict internet addiction. That means that an individual who is having way too insufficient social relations in terms of quality and quantity will be addicted to the internet. This finding implies that the students who are lonely would more likely become addicted to the internet and would also feel more lovely, happy and important while on the internet.

The benefits of using social networking sites include making new friends, growing friendship and personality development. It also improves the user's way of communication (Ellison, Seinfeld & Lampe, 2007). Nelda and Annan (2000) found that students who were pathological users of social networking sites had more academic, social and interpersonal problems as well as lower self-esteem.

Also, when we look at the results of the study, it is clear that students with low academic performance are more inclined to use the social networking sites, because they feel lonely and more isolated in real life. They cannot express themselves, experience difficulty in sharing feelings and having social communication. So they may prefer chatting with internet friends, because that is less stressful compared to face-to-face relationships (Peter, Altemburg & Schouten, 2005). The internet may be used as a defense mechanism in order to cope with loneliness.

At the same time the results in our study showed that social networking sites are not playing a significant role in inducing loneliness among students with high academic success. This means that according to our study there is no correlation between social network usage, loneliness and academic performance. Internet was negatively associated with high academic success, perhaps because the students use it to obtain academically related information or to discuss educational matters on it. We think that they are more satisfied with their real lives and do not use the internet for social communication. High achieving students may be engaged in a variety of virtual and real learning behaviors, which was effective in their educational process.

Conclusion

The present study summarizes that there is a significant positive relationship between social networking sites like Facebook, Twitter or Internet, loneliness and academic success among university students. It can be concluded from the findings that excessive usage has converse relation to students.

Students who feel lonely in real live are more likely to use online communications in order to form close relationships with those they met online. Social networking sites are tools which help them polish and maintain relationship, create online personal where they alter their identities and pretend to be someone other than themselves or to complete course assignments.

Some limitations of this study should be kept in mind while examining the results. First, the sample was restricted to university students who studied psychology in Tetovo and Skopje, so the results may not be general to all

Macedonian university students. Further research should be carried out with more group representatives including students from all the universities in Macedonia. At the same time further studies should be conducted with different demographic variables such as religion, ethnicity, family size, socioeconomic status and different personality traits.

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The Personal Characteristics Predictors of Academic Success

Abstract

When we speak about the academic achievement of the students and their personality, the internal state of a student is in connection with his personal experience and individual differences and talents, dispositions, motives, his “I” and a whole range of cognitive processes. Modern psychological theories of personality believe that the learning and the achieved academic success represent the overall activity of the individual. It is very important to understand and determine the factors that affect the learning process in order to get a full picture of the personality of the students regarding their achieved academic success.

If we analyze the personality of the student in depth, we will understand that the academic success, besides the influence of the curriculum external factors, is significantly influenced by the dominant traits of his personality.

The personal characteristics are presented as a set of internal components that determine the success and the quality of action of the students. The relationship between the dimensions of personality and the academic success are the subject of research of many authors. One group of authors puts emphasis on intelligence as a factor for success in the learning process, while another group believes that success depends on the personal characteristics that are dominant in the individual. The purpose of this paper is to ascertain the role of the personal characteristics of the students regarding their academic success, and to understand which personality traits are dominant among respondents of male and female gender. For this purpose, in the research we applied the big-five model of personality by which we obtained data on the five dimensions of personality: neuroticism (N), agreeableness (A), openness to new experiences (O), extraversion (E) and conscientiousness (C). The research is conducted on a sample of 74 students aged 20 to 22 years, whereas the success is a representation of the average score they achieved during their studies. Based on the results of the survey it can be inferred that in the female students there is a positive correlation between openness (O) and extraversion (E) and success at school, and in the male students there is a statistical significance between agreeableness (A) and neuroticism (N) and success in learning. Based on the conducted research we can conclude that the success depends on the personal characteristics of the person.

Keywords: personal characteristics, academic success, students, gender

Introduction

Traditional systems of educational work have one-dimensional basis, where the person is treated as a substrate material ready to be influenced by the external influences. Many learning theories reduce down the behavior and learning of students to passively reacting on external developments, whereas external influences do not correlate with the structure of the student’s personality (abilities, attitudes, motivations, etc.). Today, it is known that they are of great influence to the students’ achievements.

When speaking about the academic achievement of the students and the personality of the students, the internal situation is associated with the personal

experience of the student and the individual differences and talents, dispositions, motives, his “I” and a whole range of cognitive processes. The academic success is defined through two perspectives: external and internal. The external perspective relates to academic success, whereas internal perspective refers to the inner experience of the student or his or her assessment of the academic performance and personality traits (Kuzmanović, 2011).

The modern psychological research about humans talks about the process of learning and academic success as all-embracing activities of the person. His influence in the process of learning has both positive and negative forms of behavior and personality traits. The knowledge about the factors that affect learning and the knowledge about personality traits have a great impact on the achievement of the student. Psychologists have conducted many studies which assess factors that affect academic success; factors such as intelligence, self-image, and gender are just part of the factors that psychologists explore as important predictors of the academic success (Eyong et al., 2014). Understanding the relationship between personality traits and academic performance determines how personal personality characteristics affect learning and the student’s achievement.

The central problem of the educational system is the learning which progressively changes the individual and as such it evolves under the influence of the environment and the personality of the student.

The learning ability develops in parallel with the intelligence and the personality traits of the student. Because of that, there are individual differences in learning achievements of students. Personality of the student is a combination of action, thought, emotion, and motivation. The student’s success is not only a consequence of intelligence. The psychological aspects of the student have an important influence in the student’s achievement as well. (Atashrooz et al., 2008).

Personal characteristics and academic success

The personal characteristics are defined as a set of internal components which determine the success and the quality of the student. Students are differing in the degree of development of their personal characteristics.

Personal characteristics of acquiring new knowledge and achieving success in learning depend on the intellectual development of the students and the overall structure of the personality of the student (Vittorio et al., 2000). The dimensions of personality and academic success are the subject of research of many authors. Alfred Benet, together with his associates, constructed a test in order to measure the intelligence of children. The test could be used to diagnose the intelligence of the intellectually unsuccessful children who were not able to master the academic program (Ivanović & Ivanović, 2011). Another group of authors who believe that intelligence is not the only factor which is important in the learning processes, often uses the term intellect so as to highlight the varieties of intellectual functioning (Stojakovic, 1990).

Ananjev, Stepanova and Petrov, highlighted three functions and the aspects of those functions in the structure of intellect (memory, attention, and thinking) and they also discussed the interactions of those functions which determine the intellectual behavior of the student.

Cattell believes that the G-factor consists of two main abilities: fluid and crystallized intelligence. Fluid intelligence is not related to any specific skill; it depends on the heritable traits and the developed youth but quickly begins to weaken. The learning of that ability evolves the other, the crystallized intelligence that interacts with motivation, memory and the impact of the environment, which represents the acquired ability to perform complex intellectual tasks (Radonjic, 1992).

Personality traits as important components in learning and achieving success in learning represent consistent and permanent individual characteristics in the organization and the functioning of the learning, especially in relation to how the student receives and processes new information, how he processes, systematizes and stores it, and how he solves certain problems according to them. The personality traits of the student contain the cognitive, sensitive, and motivational components. These components bind to certain personality traits such as initiative, independence, and courage in research (Mandoc, Tanackovic & Tanackovic, 1984).

Differences in personality traits of students are the reason why students approach the school material and process it in a different way, and therefore achieve different learning results (Stevanovic, 1998). That diversity seen in the processing of receiving information is connected by some students with the already learned information; while others are remembering it as they receive it (it does not affect favorably the success of learning). Depending on the personal characteristics of the student, through the learning process some students learn the material superficially and achieve lower results, while others approach the material systematically and thoroughly.

When using the big-five model so as to assess the impact of personal characteristics on academic success, consciousness as one of the dimensions of the big-five model in a number of research stands out as a significant factor in the success of learning at all ages (Šarčević & Vasić, 2014).

Purpose of research

Adolescent personality is very complex. There are many factors that influence the development of the personality of the adolescent and the formation of certain dimensions of his personality. Each dimension and characteristic of the personality of the adolescent has an impact on the performance of its daily activities and the achievement of the academic success.

The purpose of this study is to determine the influence of personal characteristics of the personality of the student and their role in achieving academic success in students in third and fourth year of study.

Methods of research

Hypothesis of the research

The issue in this research can be defined through the following question: “Which personality traits are dominant in achieving academic success of students?” and we have set the following hypothesis: The effect of the personality traits and the gender of the students on their academic success.

The achievement of the students was taken as a dependent variable in this research, while personality traits and gender are the independent variables.

Participants

The research was conducted on a group of 74 students aged 20 to 22 years, from the State University in Tetovo and Skopje. The success is calculated by the average success of the last year. The research involved 37 female students and 37 male students and was conducted during September and October 2015.

Big five inventory for personality traits

Personality traits are tested with the big-five model of personality by which the data is obtained on the five dimensions of personality: neuroticism (N), agreeableness (A), conscientiousness (C), extraversion (E), and openness (O). Big five model of the person (Big five inventory) comprises 44 items.

This instrument uses short phrases that describe the person. Each respondent should make a choice for each statement, stating to what extent they agree with the statement. BFI has the advantage of simplicity and comprehensibility of the items.

The research was conducted on a group of 74 students aged 20 to 22 years, from the State University in Tetovo and Skopje. The success is calculated by the average success of the last year. The research involved 37 female students and 37 male students and was conducted during September and October 2015.

Data analysis

Statistical analysis of the results obtained in the research was conducted with SPSS 20 and Pearson correlation coefficient to determine the relationship between the dependent and independent variables for significance level of 0.01 or 0.05.

Results

From the obtained results it can be seen that there is a substantial statistical significance between the achievement of the students and the dimensions of personality measured by the big-five model of personality. With the statistical analysis of the data, we obtained presence of high correlation coefficient between female students, average score during studies and personality traits. We found that in female students there is a positive correlation between openness (O) as a trait of personality and average score level of $p < 0.01$. Also we found a positive correlation between extraversion (E) and average score at the level $p < 0.05$. This significant correlation points out that female students are more open to new experiences. In this group, tolerance for what is around them is greater and also represents the quality and the quantity of social reactions. These dimensions that are proven to be dominant among female students have an impact in achieving average score and success for them, thus openness to new experiences is more influential and impacts the success achieved. A wide range of interests and the need to share their experiences with others gives them greater freedom in the interactive process of learning. Using such relation as a way for easily and quickly getting information is important in the learning process. Females, in the process of learning want to

explore and learn new things, for which the examined and achieved success makes it easier.

In the case of the male students statistics present a significance between agreeableness (A) and the average score at the level $p < 0.01$ between neuroticism (N) and the average score achieved at the level $p < 0.05$. This level of significance in this group points out that achieved average success among male students has a great impact on the degree to which these individuals enjoy being in the company of others. They are capable of empathy, ready to help and want to receive help, and they use it as a way of reducing the high anxiety experienced by the forward-facing of a stressful situation related to learning and transferring learning.

Our hypothesis has fully confirmed that personal characteristics affect academic success.

Discussion

The learning as a process of acquiring new knowledge which enriches the personality of the student has a great significance in the life of the adolescent. Depending on the level of acquired knowledge, students get average grade from which the level of knowledge of the student can be identified. In the process of overcoming the curriculum content that should be learned to obtain the final average grade, the student is taking some processes and is also influenced by certain group of factors (Nye, Orel & Kochergina, 2013). Despite the motivation of the student to study, the external factors, the intellectual capacities of the student, and the influence of personal traits are also the basis for achieving the student's knowledge.

When you describe the personality traits you actually describe a person, but we can still make a difference between the members of a group (as in the research group of adolescents). Many psychologists consider the term "personality traits" as basis, structure and dynamics of personality, not only in determining the consistency in behavior but also in encouraging personality in specific activities. Personality traits have structural and motivational characteristics. As a result of the above mentioned, we can say that based on the person's personality traits, it depends to what degree will the student master the curriculum material and to what extent he or she will be motivated to learn. (Hrnjica, 2005).

Despite of the results obtained with the big-five model of personality, gender of the respondents and the averages for the studies may be a note that there is a connection between all these variables. Certain dimensions of personality have a significant impact in their particular group of students, according to gender in some more prominent than other. So in the female group of students, the dominant personality dimensions are extraversion and openness, while the male students are dominant in agreeableness and neuroticism. Analyzing the dimensions of personality and the average success of the students, it can be observed that in the process of learning and achieving success of students the dominant personality dimension measured by the five models has an influence as well. All this confirms that personality traits play an important role in the learning process. What will the student's achievement be on a large extent depends on the personality traits of the student which determines the character of the personality of the student.

From the research it can be noted that achieving success in learning is influenced by emotional stability or its opposite neuroticism. High scores neurotics

leads to achieving low results in learning. The reason is the anxiety that is present among students because it shows a lower success than in those students who are emotionally stable, although a small dose of stress positively affects the motivation of learning. Extraversion as a dimension that affects learning and achieving success is linked by the energy and the various activities in those individuals who possess extraversion. Eysenck says that extraversion people, depending on sociability and the activities they deal with devote less time in school obligations and achieve the poorer results. Poropat (2009) found a significant association between extroverted and average success in learning. It can be concluded that extrovert people invoked in those items that require an interactive approach in oral transferring in learning. Openness is associated with the learning as demonstrated in this research. The meta-analysis of Poropat proved that this dimension has the greatest correlation with intelligence, but not with success in learning. On the other hand openness in our research showed significant correlation with success in learning especially among the female group of respondents.

Conclusion

As many authors highlight, besides intelligence, personality and personal traits are an important factor in achieving success in learning. Based on the results obtained through the big-five model of personality we are coming to the conclusion that if we meet the personality of the student better, it can be estimated which personal trait influences learning and achieving success at school.

From this research we can conclude that there is a significant association between the personality traits and the gender of the respondents. Among the female respondents dominant personality traits which positively correlate with average success are openness to new experiences and extraversion, while among male respondents these traits are agreeableness and neuroticism.

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Part 5

Law and Education: Legislation and Inclusive Education, Child Protection & Human Rights Education

Elizabeth Achinewhu-Nworgu & Queen Chioma Nworgu

An Exploration of the Wider Costs of the Decision by the Rivers State Government in Nigeria to Revoke International Students' Scholarships

Abstract

In a move intended to cut costs to the state, the government of Rivers State has announced that it is revoking international scholarships for its young people studying overseas (except for final year students). Whether or not there are corresponding courses available for them back in Nigeria, some 600 students are effectively being recalled and will have to complete their degree studies in higher education institutions in Nigeria. This controversial decision can be subject to analysis on several different levels: from an economic point of view, does a cost-benefit analysis show this to be an effective measure; legally, has the Rivers State government breached its contract with the students and potentially also infringed their human rights? These questions can be subject to much debate and will take time to resolve. The full economic costs/benefits of the policy change, and the legal ramifications, may not be known for many years to come. This paper takes a more immediate look at the impact of the decision, by considering the views of some of the 600 students caught up in the middle of this key policy change. Data collection was based on interactions with the students and a telephone interview. The findings of research demonstrate deep concerns and objections from the students and their parents, with main emphasis on the damage to their future career, although with few students very positive about going back home to complete their study. The findings at this initial stage will further explore the legal implications, humanitarian and rights of the students in relation to their signed contracts for the scholarship award.

Keywords: education, scholarship award, students, policy change, human capital, violation of human rights

Introduction: Overseas scholarships for Nigerian students

Every year, more than 4,000 Nigerian undergraduates write aptitude tests to join the ever growing list of students which the government bodies – RSSB and other agencies such as the RSSDA, NDDC and Shell Nigeria support in Nigerian Universities and studying overseas. The applicants are shortlisted on the basis of the national Senior School Certificate Examination (SSCE) and Joint Admission Matriculation Board (JAMB) examination results. This is followed by an aptitude

test at their designated areas such as Port Harcourt, Warri, Enugu, Lagos and Abuja centres.

There are two categories of the Scholarship Scheme, the National Merit Award (NM), open to Nigerian undergraduates and Areas of Operation Merit Award (AOM), for students from communities in which Shell Nigeria operates. Only first year students are eligible for the awards in both categories.

An average of 16,000 applicants respond to advertisements by the Nigerian government and other agencies every year, inviting qualified candidates to apply for the scholarships which are tenable on Nigerian Universities or to study abroad.

The Rivers State Government, through the Rivers State Sustainable Development Agency (RSSDA) offers the “State Government’s Special Overseas Undergraduate Scholarship Programme” to suitably qualified candidates of both Rivers State and non-Rivers state origin. Awards per student covers the Air fare, Tuition (school, lab, books, etc.), Accommodation (halls of residence within the school, private apartments outside the school) and Monthly upkeep.

Human Capital Development is one of the core stated aims of the Rivers State Sustainable Development Agency (RSSDA). It is geared towards improving the human capital base of Rivers indigenes (and also non-indigenes in many cases) through target programmes, which include the overseas undergraduate scholarship, overseas postgraduate scholarship, ICT training, Greater Horizon and Opportunities Programme, Overseas Technical Training programme to mention but a few. These scholarships are available to young people from Rivers State who must meet the laid down criteria.

Eligible groups

Undergraduate students of both Rivers and non-Rivers origin, so long as the latter are children/wards of taxpaying non-indigenes that have been resident in Rivers state for a minimum of 10 years.

Scholarships are available for study in fields including Engineering, Petroleum, Oil and Gas, Medical Sciences, Economics and Computer Related Studies, to mention but a few.

A lot of Nigerian students on scholarship derive a lot of benefits particularly to some from poor families of whom without the scholarship award, cannot afford to study for a degree more so to study abroad.

The amount of benefit gains for students on scholarship range from, air fare, tuition, accommodation and upkeep allowances. To qualify for a scholarship award, students can apply through online, manually, or Local Government Council Secretariat nearest to the candidates and each student has to go through an aptitude test with the originals of their credentials seen during the screening of shortlisted candidates.

Between 2009 and 2014, over 600 Nigerian students from Rivers State were sent overseas to acquire foreign education of which over 400 students were placed in various UK institutions. However, based on political upheavals with the present Nigerian government policy on managing change, change of government from People’s Democratic Party (PDP) to All Progressives Congress (APC) imposed a challenge to the scholarship students studying abroad. Coupled with the financial implications as a result of a fall in oil prices which was the major source of Nigerian

revenue with a reduction in State allocation resulted in an announcement by the Rivers State Governor to withdraw all foreign students' scholarship award, except for final year students who were asked to stay behind to complete their programmes. This obviously has an impact on those affected.

Background: Policy change by the Rivers State government

In 2009, Governor Rotimi Amaechi under the then PDP government offered scholarship award to deserving Rivers State indigenes to study for an undergraduate and postgraduate programmes following a rigorous screening which was aimed to help those disadvantaged to come abroad to gain foreign education in such places as the United Kingdom, India and Canada to mention. The most important aspect of awarding scholarship to Rivers indigenes was to give access and opportunity to the youths of River State Nigeria to come abroad to study those courses that are not available in the Nigerian institutions; and to fill up the gaps in skill shortages in the Nigerian labour market. It was a big privilege for the students and their parents whose hopes were raised with the expectation that their children will be returning home with these aimed-for qualifications.

However, a good number of the advantaged students that came to study overseas spent one or three years, completed their programmes and went back home to serve the state. The policy of the Scholarship award is that students on scholarship on completion of their programmes must come back home to serve their States through Youth service, done for one year as a give back to the state government as long as they are below 50 years old. In this policy, the students benefit with all their fees and allowances fully paid until they complete their programmes.

After the 2015 election and the change in government, the award of scholarship was no longer the primary responsibility of the Ex-Governor Rotimi Amaechi, hence the onus now lies on Wike government who is the predecessor of Rotimi Amaechi government. Governor Wike having resumed office in May 2015, coupled with the political desire to implement a proposed change in Nigeria by the present incumbent; on 3rd December 2015, he announced the State policy to withdraw the awardees' scholarship abroad due to financial crisis in Rivers State as well as entire Nigeria.

In 2009 when the scholarship scheme was implemented by the Ex-Governor, many people were overwhelmed with the decision, which was believed would facilitate a cross fertilisation of ideas, knowledge and best practices in education of the Rivers State Youths, as the beneficiaries would return home with fresh insights that would also contribute immensely to the development of their state. This decision instigated the formation of the RSSB scholarship board formation committee with a Chairman to oversee the Scholarship Board with the primary aim of awarding scholarships to Rivers State students who met the criteria for award of scholarship. Even though the scheme was said to have plagued by logistics and lapses, which sometime was threaten to the entire exercise, it managed to trudge on amid complaints with many students having to benefit from academic achievement particularly in gaining access to a British education.

The Rivers State government says it can no longer continue to fund the Rivers State Sustainable Development Agency, RSSDA, overseas scholarship, although no mention of the Rivers State Scholarship students (RSSB) who are also the

beneficiaries of the Rivers State scholarship scheme. However, the suspension by the incumbent Rivers State government led by Governor Wike, owing to the dire financial straits, a dwindling revenue both from FAC and IGR and problem of exchange rates, which is affecting the State, has left many of the beneficiaries in foreign universities and their parents and guardians in shock and frustrated hence leading to some social and psychological implications on those affected.

Parents and guardians are also concerned by the fact that some of the courses studied by the beneficiaries abroad were not offered in the two Rivers universities, where the government are offering them the opportunity to complete their programmes that they started overseas.

As one of the beneficiaries said, since government is a continuous process, the Wike-led administration should strive to ensure that those that are currently enjoying the scholarship are seen to the end of their programmes, as bringing them back to state-owned universities would drastically affect their studies as well as their emotion.

He also said, “If you bring them back, the beneficiaries would suffer psychological, emotional and social trauma. Even if the programme should be discontinued due to paucity of funds, government should allow those already in school to finish their education” (Godwin in Guardian, 2016).

Theories of adaptation and change

Education policies are the principles and government policy-making in educational sphere, as well as the collection of laws and rules that govern the operation of education systems. Education occurs in many forms for many purposes through many institutions. Education is the process of receiving or giving a systematic instruction, especially at a school or university. According to Merriam-Webster, education is the action or process of teaching someone especially in a school, college, or university; the knowledge, skill, and understanding that you get from attending a school or university. Education is affected by the rapid changes imposed by government policy, rules and regulations.

Ford and Ford (1995) and Rollinson (2008) both define “change as a move from being in one organisational state to being in another state”. Rollinson (2008, p. 632) further qualifies “organisational change as the ability of an organisation to survive change and will depend on its ability to master the process of change”. Mullins (1996, p. 823) identifies that “despite the positive outcome, change is often resisted at both an individual and organisational level” and for the students, there is a need to resist due to a drastic impact it may have on them. It is common for the students to react and or resist to this change, in a variety of ways, depending on the scale and scope of change and how this will impact on them and the government of Rivers State considering the financial implications envisaged.

However, the most common reasons for resistance to change are seen as – *Fear of the unknown* – given that students are generally settled in their various programmes, may exhibit episodes of anxiety stemming from misplaced fear of the unknown, in terms of them being withdraw from their existing courses in the UK and being asked to go back home to complete their courses.

Security with the status quo – generally students may have developed a sense of security with their current UK institutions with some already given some

responsibilities as student leadership, acquainted with friends, systems and processes seen as familiar territory. Change and upheaval may invoke a sense of loss and further compound feelings of fearfulness and or anxiety and hence will lead to resistance to go back to home countries to accomplish their career.

Status and position – anyone facing changes are mindful of their positions within the organisational hierarchy and changes may be viewed as major threat in the attempt to alter this, the Governor may have made his decision based on the present financial crisis in the State and to secure funds to run the State and for the students, they need to retain their status in their various institutions.

Change is a complex phenomenon, requiring examination from different angles including individual students and political perspectives. However the most common generic reasons for resistance to change can be linked to **uncertainty** – in nature, individuals have varying capacities to deal with uncertainty and ambiguity and therefore will resist change regardless of the good that may come with it. Consequently, the change process may be a rather distressing and unsettling experience particularly to these students as it came to them as a shock and unexpected. On the economic and career aspects there are concerns that any changes imposed may hinder their opportunity in securing a good job without a British education which they left home for; and this will affect their rewards on the job market or threaten the job security.

Change can result in inconveniences or disruptions to on-going programmes hence resistance sets in as in the case of the Rivers State students. Change can result in **habitual tendencies** – people acquire habitual, ways and approaches of conducting the duties and they find comfort in its success, for the students, they are comfortable with their work and ways of doing things here, asking them to go back can be difficult to learn new ways of operating which can lead to resistance. Students have already made friends in UK, therefore loss of associations with their colleagues – settled teams; work groups are all difficult situations to face hence resistance sets in.

Methodology

The work is derived from our day to day interactions with the international students in dealing with their academic and welfare issues that may affect their studies. The students for this study are the international students from Rivers State Nigeria who are on government sponsorship. The research was based on our experience and a recent government announcement to withdraw the scholarship awards from 600 students studying overseas which UK students are affected. This drastic decision and fear of the proposed change prompted us to carry out this mini study to find out how the students and their parents felt about the announcement on completing a degree and impact on their career development going back to their home countries without a degree.

To capture the students' comments, a telephone interview was employed to a sampled opinion of 60 students, 36 from the Rivers State Scholarship Board (RSSB) and 24 from Rivers State Development Agency (RSSDA) studying in UK which we felt are relevant to this small scale study.

Views of students affected by the Rivers State government decision

The majority of the students interviewed have commented on how the change in policy of withdrawing their scholarship award has given them some social and psychological impact.

Socially I am ashamed to go back home to face my colleagues whom I proudly told that I was leaving them in 2014 heading to UK for my degree with the award of RSSDA scholarship. How can I now go back home to face my friends and colleagues without my degree, God forbid, they have to change this policy, I bet it was said because of the political pressure at home. Madam, please speak to the government using your educational knowledge in UK. (Student 3)

I just feel that my future is ruined. I am neither here or there now. Please let this not happen to me. I am in the middle of finishing my year two, how can I go home to start all over. Nigerian universities do not have same facilities, for oil & gas programme. This should not happen. I can't sleep. I left home to have a UK degree, I must go back home with a degree. (Student 8)

My parents cannot even pay my fees back home. Both of my parents are on pension, who will support me to complete the degree. I disagree with this idea. (Student 9)

I understand that the present government have come for a change and that change has some financial implications which can affect people. Stopping our funding means a bad impact on us and affecting me emotionally and psychologically, the thought of going back home to complete my programme is enough to get me mad. Why give us a scholarship that will not sustain our programme to completion, what a waste of time and resources, serious impact on my career and my future development. (Student 28)

Well, I can understand the reasons behind the Governor's decision to send us back to complete our programme at home, there are many of us here, if no money to continue with us here, what can we do, I appreciate the opportunity but if they cannot afford it anymore, I am happy to go back home to continue, as long as they put me in a university that has all the facilities for my course. It drains me emotionally, but I have to bear it because, it's all about change. (Student 31)

I thank the past government for their kindness in awarding us scholarship to come and study abroad, but they did not end it well by not accomplishing the aim. It is a shameful and most embarrassing of all to ask students studying abroad to come back home without completing their programme. Which of the universities will offer us the type of facilities over here? For me change has not done me good and I hate change. (Student 37)

Conclusion and further research

The findings of the survey indicates deep concerns and objections from the students and their parents on implementation of this policy to 'withdraw' the students in the middle of completing their programmes and not achieving British qualifications, with main emphasis on the damage to their future career, although with minority still positive to go back home to complete their programmes. However, this work is an on-going research and will further explore the legal implications, humanitarian and rights of the students in relation to their signed contracts for the scholarship award.

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Strategies for Improving the Employability Skills and Life Chances of Youths in Nigeria

Abstract

The level of youth unemployment in Nigeria has always been an issue of concern for Focus Learning Support team, particularly in our interactions with foreign students studying in the UK; and also with our dedication in “Making Education Count for the Youths”. This paper examines some of the difficulties experienced by young people in Nigeria when seeking employment opportunities, with a focus on employability skills as a way to overcome these barriers and form a basis for strategies to improve young people’s life chances. The paper will also provide a comparison of how employability skills are implemented in schools and colleges in the United Kingdom as compared to Nigerian schools and colleges. Furthermore, this research will present the perceptions and experiences of students on a BTEC Business Vocational course in an inner cities further education college; who attended work experience during their studies. The primary question is to find out whether imbedding work experience programme on their BTEC course has had an impact on their future career choice. Collection of data was done in stages using questionnaires to capture the views of participants. The findings of research clearly confirm the benefits derived from the BTEC students who attended work experience and the link to their future career choices. The findings of this work has therefore created an avenue for the FLS team to carry out further research implementation and imbedding employability skills into the Nigerian education system to support youth employment in the country.

Keywords: employability, mentoring, wider-world, work-experience, guest-speakers, apprenticeships, career development

Introduction

The current state of youth unemployment in Nigeria is astronomically high, with many young people in Nigeria neither in education, training or in gainful employment; this obviously needs an intervention of the Federal Government. The implications of high youth unemployment on Nigeria’s economy are detrimental to enabling economic growth and development. The number of young people aged between 15 and 34 years of age and without employment stood at 11.1 million (Akande, 2014, p. 1). He further points out that “in terms of age, younger youth struggle even more to find jobs, and that two thirds of unemployed youth are aged between 15 and 24 years of age and that in terms of gender, available statistics show that the majority of unemployed youth are female”.

Furthermore, he suggested that from 2008-2012, over half of this group (15-24 year olds) did not have an education past primary school; he suggests that those without secondary education have consistently accounted for over 50 per cent of all unemployed youth; and that “graduates of tertiary institutions also seem to be badly hit by unemployment too, making up about 20 per cent of youth unemployment and

often remaining unemployed for upward of five years after graduation” (Akande, 2014, p. 1).

Programme schemes such as the Graduate Internship Scheme, Community Services Scheme, Vocational Training Scheme, the Women and Youth Empowerment Scheme, the Youth Enterprise with Innovation in Nigeria Scheme, (YOU-WIN) and finally the Osun State Youth Employment Scheme (OYES), among others, are all schemes that have been set up by the government in recent years to tackle youth unemployment in Nigeria (Akande, 2014, p. 5), yet the problem of youth unemployment in Nigeria still remains unresolved and in increase.

Although there are many differences in terms of population size, GDP per capita, and the creation of industries in the United Kingdom, in comparison to Nigeria, recent figures produced by the Institute for Public Policy and Research in the UK (2014) suggests “that there are still 868,000 out of work ranging from 16 to 24 year olds in the United Kingdom”. It further suggests that 247,000 of them have been looking for work for more than a year and that 700,000 young people have never had a job in the UK. The IPPR suggests that youth unemployment is lower in countries where the vocational route into employment through formal education and training is as clear as the academic one (IPPR, 2014, p. 1). This work will therefore further explore in dept relevant literature presented by academic researcher on the nature and severity of youth unemployment in Nigeria compared to UK.

Literature review: Approaches to developing employability

There are various definitions of employability, however, Yorke (2004) points out that employability may be defined as “a set of achievements – skills, understanding and personal attributes – that make graduates more likely to gain employment and be successful in their chosen occupations, which benefits themselves, the workforce, the community and the economy”. The above definition expresses the importance of employability skills for young people, the community and the economy. Furthermore, employability skills are essential to improve the life chances of young people and to stimulate economic growth.

Sure-P programme

Nigeria has made recent efforts to improve the employability skills of its young people by implementing the Sure-P programme (Akande, 2014, p. 4). The Sure-P programme was introduced in February 2012 and focuses on efforts to provide job opportunities to graduates of tertiary institutions; it also includes a whole range of activities and programme schemes such as the Graduate Internship Scheme, Community Services Scheme, Vocational Training Scheme, and Community Services, Women and Youth Empowerment Scheme, the Youth Enterprise With Innovation in Nigeria (YOU-WIN) and the Osun State Youth Employment Scheme (OYES), amongst others (Akande, 2014, p. 5).

Regardless of recent government interventions, the issue of rising youth unemployment still remains endemic in many parts of Nigeria leaving many young people open to exploitation and criminal activities, according to Afolabi and Ehinomen (2015) who point out “that studies have associated rising youth unemployment to an increase in violent crimes in Nigeria” (Afolabi & Ehinomen, 2015, p. 1).

The Sure-P programme predominately focuses on graduates of tertiary institutions; however a huge majority of youth in Nigeria are unable to attend university. According to Abdulrahman (2013) Nigeria has the highest number of children out of school anywhere in the world, which currently stands at 10.5 million. This claim has also been substantiated by UNESCO.

Apprenticeships

Meanwhile in the United Kingdom the government are investing heavily in the Apprenticeship scheme as a strategy to both ensure that youth unemployment figures reduce but also to benefit the wider economy, ensuring that the United Kingdom remains competitive on the global stage. The National Audit Office estimates that every pound the government invests in apprenticeships delivers £18 of economic benefits through increasing skills, productivity and economic growth (The Department for Business Innovation and Skill, 2015, p. 4).

The Apprenticeship scheme combines practical training in a job. Apprentices work alongside experienced staff, gain job-specific skills, earn a wage and get holiday pay, study towards a related qualification (usually one day a week). An apprenticeship has an equivalent education level and can be: Intermediate (equivalent to 5 GCSE's); Advanced (equivalent to 2 A level passes) and higher can lead to NVQ level 4 and above, or a foundation degree. Apprenticeship schemes are targeted towards young people between the ages of 16-19. They are permitted to apply for an apprenticeship while they are still at school. One is required to be over 16, living in England and not in full-time education. Young people working towards an apprenticeship are paid the national minimum wage rate; they are also entitled to at least 20 days paid holiday a year.

An apprenticeship scheme is a work based training programme that enables young people to become competent at a particular job and it includes time learning at work and studying for a relevant qualification outside of work.

Apprenticeship schemes are designed to be used by many different organisations for example large or small employers, training providers, schools and colleges (UK Commission for Employment and Skills, 2014). A huge emphasis has also been placed on universities in the United Kingdom to improve the employability skills and job prospects of undergraduates. League tables within the UK currently show the number of students who are able to gain employment 6 months after leaving university. University league tables in the UK now take into consideration student satisfaction and employability. There are currently 8 UK universities in the top 100 league of universities in the world including both Oxford and Cambridge. Unfortunately, there are no Nigerian universities that are amongst the top 100 in the world. Africa has only one joint representative and that is Cape Town in South Africa. Akande points out that "one of the reasons for high youth unemployment in Nigeria is a deficient school curricular and poor teacher training that have contributed to the failure of educational institutions to provide their students the appropriate skills to make them employable" (Akande, 2014, p. 3). The integration of employability skills within the school curriculum therefore represents one strategy for helping to address the issue of youth unemployment in Nigeria.

Nash points out that "on the job experiences can often teach young people more than what three years at university can ever offer", "it's often real world disasters

(experiences) that teach you the most, you can't experience these in the classroom". She further gave example of her experience which helped to carve out a competitive career for her in the music industry (Nash, 2015, p. 1).

Mentoring

According to MentorSET (2008) mentoring is a powerful personal development and empowerment tool. It is an effective way of helping people to progress in their careers and is becoming increasingly popular as its potential is realised. Mentoring is a partnership between two people (mentor and mentee) normally working in a similar field or sharing similar experiences. It is a helpful relationship based upon mutual trust and respect. Research has shown that targeted mentoring can help improve the employability skills of young people. The advantage of mentoring is that it is a practical and relatively cost effective practice, if mentors are paired with the right mentees it can be a very effective process indeed.

Miller (2002) points out "that employability goals are more likely to be met when there is a mentoring plus programme, which includes employability workshops, work-experience, residential or other developmental approaches". He further argues that mentoring can provide opportunities for situated learning, especially when accompanied by work experience as part of a school to work transition process (Miller, 2002, p. 69). There are of course those who dismiss the relevance and significance of mentoring as a viable process that improves the employability of young people. However, it is a process that has become popular in many parts of the world today.

Guest speakers

Guest speakers may also be used to improve the employability skills of young people within the classroom. Guest speakers come with a wealth of knowledge and are often very helpful when it comes to informing young people about tips they might use when applying for a job, they often begin a session by discussing their employment history and their background, which typically includes how they got to where they are today. Mullins (2015) points out that "a guest speaker conveys current, realistic information and a perspective on a subject that is not available from text books".

Work experience

Work experience is another strategy that may be used to improve the employability skills of young people. Work experience is to a large extent compulsory for most students attending secondary school in the United Kingdom. It is also often a requirement for particular courses at sixth form college, for example those who wish to go on to study courses such as social work, teaching, pharmacy and medicine are required to attend for a period of time, perhaps two weeks, gaining work experience in their particular area of study. Many colleges also build work experience into the curriculum of their vocational students in order to build a practical understanding of the subject that they are studying.

Improving the literacy and numeracy skills of young people

According to Shepherd (2010) a fifth of teenagers in the United Kingdom leave school so illiterate and innumerate that they are incapable of dealing with the challenges of everyday life and this includes finding employment. Some 22% of 16-19 year olds in England are functionally innumerate meaning that their maths skills are limited to little more than basic arithmetic, researchers from Sheffield University discovered. Meanwhile, 17% of 16-19 year olds are functionally illiterate. Gregg Brookes, professor of education at Sheffield and one of the study's authors argued that school leavers lacked the skills to deal confidently with many of the mathematical challenges of contemporary life, and had a lower standard of literacy "needed to partake fully in employment, family life, citizenship and to enjoy reading for its own sake".

Nigeria does not fare better with regards to the literacy rates of its young people. According to UNESCO (2012) literacy rates vary in Nigeria according to gender and states where people live, for young people above the age of 6 years. For example, Anambra has the highest score for literacy taking into consideration both male and females, and that is currently 75.1 %. In Bayelsa the percentage of literacy for both male and females are 62%, in Ekiti it is 74.7%, in Akwa-Ibom it is 70.7%. However, in Borno state it is 14.5% and in Jigawa it is 24.2% and in Kaduna it is 29.3%. This clearly shows that youth illiteracy is more rampant in the northern region of the country.

Methodology

The process of data collection for this research was gathered in stages, including quantitative and qualitative approach. 44 BTEC Business vocational students based within a sixth form college in the United Kingdom participated in the research. Participants were asked to complete 2 questionnaires each, one questionnaire focused on a recent work experience event that all of the students had participated in. The second questionnaire considered student feedback during an employability skills workshop. Three employability workshops were conducted for the students, one titled "music to business", the other event was titled "considering a career in policing", and the final workshop was titled "the importance of having employability skills".

Qualitative data was also gathered in the form of an interview with the employability manager. In addition to this, discussions and observations were made during several employability activities that took place within the college. Secondary research was also conducted to consider the current state of youth unemployment in Nigeria. Previous observations during recent visits to Nigeria were also taken into consideration, current practices within Nigeria's secondary schools and institutions of higher learning were also used for the purpose of this research.

Findings

Majority of the students who completed the questionnaires agreed to the usefulness of work experience built into their academic programme; with almost half of them being offered part time jobs at the end of the exercise.

The majority of students who completed the first questionnaire stated that they would like another phase of work experience, and that they had gained skills they

did not previously have. However, when students were asked if they had a mentor, only one out of the 44 students who completed the questionnaires declared they had a mentor. The mentor was as a consequence of the music to business event that took place in the X college and the benefit of the mentor/mentee relationship motivated him to remain on the course as he had initially considered dropping out of college.

Questionnaire 2 considered feedback from students who had recently attended a guest-speaker event; the overall findings from this questionnaire indicates that majority of the students found use of guest speakers an important resource in terms of improving their understanding of employability skills.

No 4 student said: The last visit from the guest speaker helped me to realise the usefulness of the work experience and it facilitated my interest to attend. I can now apply the skills gained to my future career choice.

No 8 student: I enjoyed the work experience and what more; it has enhanced my practical skills and future career prospects. I will want more of it in this programme.

Student 16: For me, I know what I want from onset and therefore did not find this work experience linked to my future career choice.

Most students who attended the work experience programme identified a combination of skills that they had developed during their work experience period ranging from customer service skills, commercial awareness, problem solving, leadership, confidence, financial knowledge, organisational skill, presentation skills, communication skills, technological skills, handling complaints, working under pressure, book keeping skills, conversing with customers, time management, time-keeping and making reservations.

As student 26 said: We need to make use of this opportunity offered by the college, I really appreciate it and will recommend it to all institutions as it offers great job opportunities to students particularly engaging students on part time work.

The overall findings of this small scale research clearly indicate the usefulness of imbedding work experience into BTEC programmes. Apprenticeships if implemented carefully, taking into consideration the needs of the student and small and medium scale businesses, can work towards providing another route where students are able to improve their employability skills and gain future employment and therefore should apply to all institutions.

Conclusion

Improving the employability skills of young people within Nigeria's schools, colleges and universities is integral if Nigeria is to reduce the number of young people out of employment, and improve its chances of economic growth and competitiveness. There are of course current initiatives in place such as the Sure-P programme but this is insufficient to deal with the current crisis, seeing that this programme is targeted towards graduates. Many young people in Nigeria are unable to access primary and secondary school education. Many of the Nigerian youths lack the basic skills to gain employment in the first place. Therefore, intensive investment in education imbedded with work experience, employability skill and adequate government funding for many schools in Nigeria will help create job opportunities for Nigerian youths.

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Examining the Role, Values, and Legal Policy Issues Facing Public Library Resources in Supporting Students to Achieve Academic Success

Abstract

This paper aims to present the role, values, and legal policy issues facing public Library resources in supporting students to achieve academic success. Research indicates that majority of people that own or work in the Library tend to ignore some of the vital roles, values and legal policy issues paramount to libraries. Some of these issues are centred on internet access, data protection, copyright and access for disabled. Whether you are dealing with internet access, data protection, copyright or disabilities, the best way to protect yourself is to be aware of the policies and legal implications that access to library presents. This mini research therefore aims to present the findings and perceptions of Library users with main focus on the role, values and legal policy implications; with reference to Steve Azaiki Library in a Local Community of Bayelsa State of Nigeria and impact on students' academic success. Collection of data analysis was based on our visit to the Azaiki Library in Yenagoa during the ISCEST annual conference 2014, which gave us access and big opportunity to interview some of the library users to ascertain from them how they perceive the role, values and implications of legal policy on Azaiki Library. The findings of this mini research clearly indicates good benefit and value of library resources and link to academic achievement as well as enhanced research activities of the Bayelsa law students and the entire community; although with few participants not quite sure of the key legal policy implications such as access to disabled students and data protection using the library internet. Few participants stated that it was too early to see the full benefits and full utilisation of resources as the library had recently been built and opened.

Keywords: education, library resources, legal policy compliance, students, academic success

Introduction

Student support in the world of education has always been one of the key research interest of the Focus Learning Support Group with the primary aim of 'Making Education Count' for the youths.

Students' academic success is a key issue in education and something that all involved in should take serious. Achinewhu-Nworgu (2007) in her Doctorate research identified nine key strategies promoting student retention and when students are retained, they are likely to achieve academic success. Achieving academic success obviously requires some element of support from the institutions, parents and what more the resources to back up the study. There are many strategies put in place to support academic achievements. Library is one of the key resources perceived as important in supporting students. Library is also subject to legal policy compliance in the areas of health and safety, access to internet, copywriter, data protection and access to disabled. They key issue is that all involved in the work of providing library resources (education institutions or private ownership) as an aid to

support students' academic success must comply to the legal policy obligations. Failure to provide strict rules and regulations to manage and access library information can lead to breach of compliance to government laid down rules and regulations in the areas mentioned above.

Context

The movement for Public Libraries started in America in mid-19th century (NCAC, 1999), and since then, libraries have played unique and critical role in the academic world including America, United Kingdom and Nigeria. Public libraries play vital role in providing free access to resources that stimulate the mind, develop the skills and knowledge in academic world. It acts as a connecting point for students, individuals, community and caters for other non-academic events. Libraries can be used for academic research, information about jobs, meetings, events, government activities and community functions and like every other education resources; they are subject to legal policy scrutiny and compliance.

A lot of research and literature have centred on the use and role of library in institutions; however, there are limitations in research about the importance of being aware of the legal policy issues in the areas of complying with data protection, copy rights and access for disabled in a Nigerian Local Community Library. Libraries if well-resourced and managed properly play a vital role in connecting students to achieving academic success. Use of library resources can help students to connect and engage with the universities or colleges, also in the areas of available learning materials such as books, e-learning materials and equip students with the skills and knowledge to effectively engage in academic studies.

In addition, many researchers are beginning to seriously engage more on exploring formally the benefits and values university and college academic libraries can provide to students, while others like Prof. Azaiki embarked on intensive projects in building a library as a resource centre to support students' academic achievement. The benefits and values of academic libraries has extended to scholars providing evidence of positive associations between college students' use of academic libraries and link to retention and academic achievement from their first year to their second year of enrolment and to their final first-year cumulative grade point average.

Other studies, such as Wells (2008), have revealed positive links between the number of books students borrowed and their grade point average and significant relationships between the number of resources held at libraries and students' development of critical thinking skills. In an earlier study, Wells also found statistically the significant and positive correlations between students' use of academic library resources (e.g., borrowed books, journal articles, items in the reserve collection) and their academic achievement. The effects of these research studies have helped move librarians from simply asserting that their libraries positively promote students' learning to truly understanding the ways in which students' use of academic libraries is associated with their learning and academic success. However, irrespective of the body of literature in this area, there are still limited evidence to justify a link between students' use of academic libraries to their academic success. As justified by Wells "Moving forward with a service and enhancing the library services through online, means that more remote and rural

areas have access to books which will be great". Library provides good opportunity for online services and to obtain relevant books as justified in Wells argument not to close a Local Council Library.

Library resource acts as a first point of internet access to students for their school work, children, community, government and academicians as well as the public and community at large. There is currently no baseline national data on precisely why these individuals are looking to the public library for Internet access, in any case, there are legal policy issues on copywriter and data protection and to how or to what extent they are using the technology provided in the libraries. Research evidence indicates that many libraries are integrating technology into existing programs, including children's services and homework centres. Libraries are enhancing their reference collections with electronic resources, including commercial databases of magazines, newspapers and sometimes more specialized sources. Research indicates that, as of 1997, about ten percent of public libraries—mostly in large cities—had home pages on the World Wide Web. Some of these include online catalogues, remote access to databases and guidance on finding and selecting online resources. Some libraries have embarked on more extensive (and more expensive) efforts to use the Internet to build and strengthen real-world communities, attract new users and enhance the library's role as a source of information and learning. These initiatives, too, draw on librarians' expertise in selecting and evaluating material, as well as the role of the library in protection of legal rights in accessing certain information and providing access to disabled. It then seems obvious that Libraries play key roles and values in the academic lives of students and people at large.

In examining nine key strategies promoting student retention (Achinewhu-Nworgu, 2007, 2008), most of these nine key strategies have focussed on tutoring, financial support, additional learning support, financial advice, liaison with job centres and other agencies, health care support and counselling services. There was not much mention about the role of Library resources in supporting students' academic success. Library resources provide useful academic information required by students to successfully complete a programme of study particularly in this modern era where computer access in the library plays vital role through internet access to information.

In relation to broader institution support services for students over the world, it has been found that students are generally aware that these services exist but do not always know how to access them (Martinez & Munday, 1998, p. 102). Moreover, there can be a fear of becoming stigmatised that may prevent some students from accessing these academic supporting services. The most effective student support services appear to exist where there are clear roles, responsibilities, policy and procedures for course teams and dedicated support staff to create awareness of the existence of these services (Achinewhu-Nworgu, 2007) hence creating awareness of the role, values and legal policy implications of libraries is crucial.

From the point of view of this paper, it is important that the full range of library support services are available and accessible; that students are kept well informed about these and that there is no stigma in accessing these services particularly to the disabled; as well as be made aware of legal policy compliance to copywriter and data protection acts. Library support has been seen as being a particularly important

aspect of student support, although there has been limited research on their link to student academic achievement. Access to library may be the first point of call for students when they are having difficulties in achieving academic success and are therefore key to the early identification of problems in their studies. This mini research therefore aimed to further explore whether there is a link between the uses of Steve Azaiki library to the Bayelsa Law students' academic success; whether the users did have clear knowledge of copywriter, data protection and access to disable issues relating to legal policy compliance.

Methodology

In any education research carried out, there must exist a systematic way of conducting it to basically have access for information as a tool to analyse and draw conclusions. In this small scale research, the prompt was based on a visit to Bayelsa State of Nigeria during the ISCEST Annual conference 2014, where we visited the Azaiki Public Library in Yenagoa. We approached some of the beneficiaries of the Azaiki Library who were students and some indigenes of Bayelsa community; to find out their perceptions on the role, values and understanding of legal policy issues of the Azaiki Library.

Data collection was mainly through discussion, going round talking to people, followed by a phone call to those whose numbers were collected. We targeted a small group of 20 students who were mainly law students who also attended the conference, including some university students we visited in Etuoke University in Bayelsa State. Bearing in mind that this is a small scale research; the number of participants in this present work were sufficient at this stage to gather relevant data to form research opinion and to draw a conclusion on the role, values and legal policy issues and impact to students' academic success.

Azaiki Public Library (A case study)

Azaiki Public Library Foundation Inc is a registered United States based Non Profit educational foundation organized primarily to provide educational and research assistance to students, academics, educational institutions and the general public in Africa with main focus in Nigeria. The foundation has just completed the construction of a State of the Art Library and Museum in Yenogua, Bayelsa State of Nigeria which the City is central to the Nigerian Law School-Yenagoa, University of Port-Harcourt, Center of Advanced Social Sciences and other notable educational Institutions in Southern Nigeria. The Library has over 30,000 books shelved on traditional way, an offline solution of e-library with over 30,000,000 reading materials including audio, video materials, articles to mention but a few. The main objective is to empower the new generation and make a contribution to the nation to help uplift the progress in business, science, technology and to undertake cutting-edge research that will inform policy and development in Nigeria. The Library has building reading rooms, a mini children corner, two Conference/Seminar halls (for 100 and 50 seats respectively), Museum of Niger-Delta, and a Gallery of Modern and Contemporary African Arts occupying four large halls. As a generation of greater opportunities backed up by modern technological advancement and unprecedented innovations, the activities of the library is committed to knowledge

development services creating a legacy of continuing education, re-engineering of skills and retaining leadership position by providing up to date needing materials and a world class e-Library. The key focus of this mini research is to examine the role and contribution of the library in providing needing materials and a world class e-library to support students from Bayelsa State of Nigeria in achieving academic success also to find out the understanding of the legal policy and compliance in the areas of copywriter, data protection and access to disabled.

Findings

Majority of the people we had discussion with during the visit were very grateful and appreciative of the Azaiki library as a good resource centre for them, particularly within their community as people can easily visit the library and get relevant books to study. The Majority of the law students met found the use of the library relevant in accessing the history and law books which are made available and accessible. The findings also indicate that most law students who made use of the library to borrow books for their studies (law and history books, offline loans etc.) performed better in their studies. Most students who used the library commented on the values and benefits as being relevant to their academic studies in the areas of information technology using library computers for internet access, search for information, relevant literature, developing analytical skills, effective reading and writing, access to research materials and generation of academic ideas in report writing and essays. However, few of the participants did not realise the seriousness of compliance to the legal policy implications such as data protection, copywriter and access to disabled.

Students' comments

I witnessed the building of this library and I am very happy that it benefits me and other law students in our studies. Although a little bit far from my university, I don't mind coming all the way from Etuoke to use the library. It has what I need, relevant books and I like reading different textbooks before constructing my essay. I can also browse the computers for what I want to research on. The resources definitely help a lot in boosting my grades as I can compare and contrast with other books. (MA)

Madam, honestly the root of academic success is having the resources to support it. A study without access to a good Library does not go well. The good thing about Azaiki Library is that it has a lot of resources, many different text books from abroad, very neat and tidy, conducive atmosphere to study quietly. I like coming here to hide for my studies. However, more people need to have access and made aware which can be done through creating more awareness. (CHA)

I cannot tell you how grateful we are in this community having this wonderful Library mainly used by the law students. Ma, you do know what it takes to study law, constant reading of relevant and current cases, articles and law books with changes in articles and law, require updating of the skills. In UK, most libraries open 24 hours. We need that here particularly during exam time. Finding relevant books here in Nigeria to cope with your research work is not easy, but his library is a great opportunity for us and can be more resourced with current law books. (HE)

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Gorazd Sotosek

Peer Exclusion at Physical Education

Abstract

School sports give all pupils opportunity to learn to be tolerant to others regardless of their differences or shortcomings. This is getting more and more important due to the growing differences in physical and motor skills, different social backgrounds, besides there is a growing number of pupils having different backgrounds, nationalities etc. Peer exclusion at Physical Education (PE) in primary schools which can take many forms should be treated properly, according to teachers' opinion. The most frequent causes of exclusion are the lack of motor skills, being overweight, some character features and social status as well. It is normally a very painful problem for the excluded pupil which often leads to avoiding sports activities or maybe even to cutting PE classes.

Sports teachers should be aware of the problem, be able to identify the source of troubles in their classes and to solve them.

Keywords: peer exclusion, physical education, primary school

Introduction

Fight against social exclusion in education and also other types of exclusion is becoming an increasingly prevalent topic. The importance of the educational system in the increase of social inclusion is also highlighted in the report of the Commission of European Communities to the Council and European Parliament on efficiency and equity in European educational systems (European Parliament resolution of 27 September 2007). The report concludes that to increase competitive advantages and social inclusion in the EU, educational systems must be reformed to increase their efficiency and equity.

There are many documents supporting the idea of equal participation of all students in the learning process, both at European and national, Slovenian level. This is the orientation in all curricula for school subject of sports in primary and secondary school. It is similar at the pre-school education level.

In primary and secondary schools, we often face multiple challenges related to pupils coming from different social, cultural and linguistic backgrounds which are becoming more and more diverse. At PE in primary and secondary schools there is also a growing difference among students in their motor skills. The increasing range can be confirmed by the surveys (Strel, Starc, Jurak, Kovač, 2012). This broader range is observed by teachers themselves which causes many difficulties in their teaching.

Physical education is one of the areas where elements of education should be even more strengthened. The goals of physical education in the vocational education system emphasise the importance of social learning (Kolar, 2011). Social learning is particularly present in sports games, where students through the adoption of game rules learn relations in the group: their interests are submitted to the interests of the group, to mutual assistance, consideration, understanding and accepting differences.

Problem of peer exclusion

We observe from our own teaching experience as well as from working with schools that the unwanted behaviours occur also in PE lessons. And by unwanted behaviours we mean the phenomenon of peer exclusion.

Discriminatory forms of behaviour occur on the basis of various factors, in different learning areas or sports content. It is possible to notice reluctance to less skilled pupils and to pupils belonging to socially disadvantaged groups, national minorities and others.

Therefore, some pupils experience exclusion in sports games and they are even ridiculed because of their lack of skills. This often leads to avoiding PE lessons which are normally very popular with young people. PE is the school subject which in its curriculum highlights both the educational and socialization goals as well as those related to the acquisition of locomotor skills.

This is an example of the curriculum in primary school:

General starting points:

- adheres to the principle of equal opportunities for all pupils, taking into account their diversity and difference;
- pedagogical process is planned in a way that every pupil is successful and motivated; and
- encourages pupils to develop human relationships and sports behavior.

Operational objectives:

- creating views, attitudes and behaviours; and
- giving a pleasant experience to play sports.

Similar but expanded objectives and baselines are also being applied in secondary schools.

Teachers are informed about the records in the curricula, as these are their core documents used every day for lesson planning. Nevertheless, the results of the task evaluation which I have done with colleague Špela Bergoč show that it is still possible and necessary to do many things about this issue.

The online survey EnKlikAnketa has been chosen to get the answer for the mentioned problem. The survey was answered and completed by 81 teachers.

Analysis of the responses to the survey

The given results were quite surprising for us because it was really for the first time we spoke about exclusion, and the same was for teachers of sport and physical education teachers.

The majority of teachers responded that this is the topic (problem), it is necessary at least to speak about or even more that it should be properly treated.

The answers about the most common causes of exclusion are expectedly more dispersed. As the most frequent cause of exclusion is given momentum incompetency, then follow personality features, after it obesity and finally social status. As less common causes are listed ethnicity and skin colour. Religious affiliation is not perceived as a cause of exclusion; other responses were not recorded.

This raises the question about the extent to which the surveyed teachers recognize situations in which exclusion occurs in sports. In order to illustrate some

typical examples of peer exclusion, a short video was made in one of primary schools, which was also shown some participating teachers in our project.

A video showing four different examples of exclusion during the PE lesson was shown to the participants. When playing the video for the second time, we stopped it at each sequence to talk about the particular situation. The participants confirmed that this issue appears more or less frequently also in their classes. They admitted also that they hadn't paid enough attention to the problem before or even more they hadn't seen it as such problematic one.

Of course there are many other possible situations in which peer exclusion occurs in in a more or less obvious way. This is particularly the case with sports games.

Some more findings from the survey

About the question of how to solve the problem of exclusion teachers answered that they cope with it by talking with a group or with the pupil who excludes. Next there are some possibilities of adapting the rules for the pupil's own experience of exclusion and workshops treating this issue when having classroom hours.

Peer exclusion is by far the most common in sports games, it is less noticed in exercises in pairs and groups, then follow the relay games, gymnastics, dance and run. This results were more or less expected.

When participants answering the questionnaire were supposed to make a comment, suggestion or observation, they wrote:

- exclusion was a minor problem in the past, but for the last 10 years it has been much more present;
- pupils are not sufficiently informed about how to handle situations of exclusion;
- being excluded is a huge problem for the pupil;
- excluded pupils are more difficult to be motivated to work, they are not interested in new things since all these new situations create new exclusion possibilities.

Other opinions: the appropriate issue; this is a most actual issue at PE.

How to prevent peer exclusion?

The first step to prevent exclusion is to raise teachers' awareness about the existing problem. It is also remarkable and important to notice that the experience of being excluded is a very painful event, furthermore it is usually not their fault and it is often very difficult to prevent or avoid it.

It could be that the excluded child normally starts avoiding certain activities by inventing various apparent reasons for it or even starts completely rejecting PE classes. It is quite likely that in some cases it becomes the reason for obtaining different medical apologies.

We believe that the most efficient manner to prevent this phenomenon in PE classes is to organise different preventive actions-events and raise awareness among all teachers in school.

Speaking of the first three years of our school system, there are in the educational curriculum various topics related to social life and they are strongly connected with everyday life, besides our rights and obligations make part of it.

The outstanding among them in the curriculum is the thematic unit of the school subject Recognition of the Environment.

We must not forget to stress the importance of interdisciplinary / cross-curricular teaching which offers many opportunities to present real life situations within sports in a more practical way.

As a school subject, physical education or sport represents a more meaningful context and it can be connected with many other subject areas. Here we have in mind the relationship between human beings which needs to be completed with different rules, such as the respect of diversity, the acceptance of differences, the need for cooperation, loyalty, help the weak etc.

The next step is to identify such situations during the process of teaching. The truth is that if a teacher pays at least some attention to the problem of exclusion during his classes, the latter is quickly recognized and could be much easily prevented. If this is not the case, a teacher cannot take the appropriate steps and plan lessons in which no such events would not occur.

It is also possible for the teachers to take notes of their own perception of the problem among pupils in different phases of lessons and make the comparison of several classes.

In our opinion the most effective measure a teacher can take is to adapt the rules to the context and needs of his pupils and organise lessons in a way to prevent any possibilities of exclusion.

Conclusion

The final survey conclusion shows that the problem of exclusion is present in Slovenian schools at PE; therefore, it is necessary to treat the problem in the appropriate way and find concrete solutions. Teachers also need more information about this and they suggest this topic to be discussed in a more detailed way in future trainings and seminars.

How to act in the future to develop and disseminate teacher's awareness of exclusion?

We hope that sport as a school subject will represent one of the main factors to increase the social integration role of schools. It is therefore important for teachers to become aware of peer exclusion, since sports lessons are already pre-planned and realised which means it is possible to control this phenomenon.

It is also important to say that the newly introduced school subject Optional elective subject sport offers some new possibilities for teachers to integrate and teach strategies about being tolerant to differences in PE content. The objectives and the content of the curriculum (the document) supplement the regular program of sport, and the starting point in the preparation of lessons is the respect of equal opportunities for all pupils and taking into account their diversity and difference (Kovač, 2013).

The most important thing is to include children themselves into the process of detecting and solving the problem of exclusion at PE lessons.

We have realised many discussions with PE teachers in different working groups. Many good and new ideas were found and created due to our work and

finally we can conclude with certainty that the work on this issue must continue in a more or less systematic way in the future.

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Johan Beckmann

Exclusion and Education in South Africa: An Education Law Perspective of Emerging Alternative Understandings of Exclusion

Abstract

The new democratic dispensation in South Africa (1994) was accompanied by law and policy aimed at preventing unfair exclusion from educational opportunities and promoting equal access to educational opportunities. However, feelings of unfair exclusion remain and new understandings of exclusion are emerging.

This paper examines the new policy and law introduced after 1994 some emerging understandings of exclusion. The paper points out that the “new” exclusion is difficult to conceptualize and address. Addressing the challenges posed by them might be more difficult than was the case with exclusion under apartheid rule.

Keywords: exclusion, inclusion, understandings, images of exclusion, language, race, not being there, unlocking

Introduction

This paper is about education law, policy and practice issues concerning access to, and exclusion from educational opportunities and emerging feelings of exclusion.

A brief history of legislation and policy aiming to include everyone and prevent exclusion

The closing paragraphs of the (“Interim”) Constitution of the Republic of South Africa, Act 200 of 1993 (Republic of South Africa, 1993) provide an absorbing description of the nature of South African society before democracy, its challenges and opportunities:

This Constitution provides a historic bridge between the past of a deeply divided society characterised by strife, conflict, untold suffering and injustice, and a future founded on the recognition of human rights, democracy and peaceful co-existence and development opportunities for all South Africans, irrespective of colour, race, class, belief or sex.

The “untold suffering and injustice of the past” included unfair discrimination regarding, or exclusion from education.

An impressive suite of laws and policies accompanied the new dispensation but some challenges were unanticipated or under-estimated (Beckmann & Prinsloo, 2007, p. 1). Paragraph 6 of Chapter 3 of the White Paper 1 on Education and Training (Department of Education, 1995) (hereafter White Paper 1) contained a warning:

When all South Africans won equal citizenship, their past was not erased. The complex legacies, good as well as bad, live on in the present.

White Paper 1 was the first comprehensive policy on education and training for *all* South Africans. It is still in force along with other policy documents such as White Paper Six on Special Needs Education (Department of Education, 2001).

Paragraph 1 of Chapter 3 of White Paper 1 emphasises “The challenge the government faces... to create a system that will fulfil the vision to ‘open the doors of learning and culture to all’”.

Paragraph 7 of Chapter 3 of White Paper 1 points out that, before 1994, the distribution of education and training provision in the country followed a pattern of “contrasts and paradoxes”. There was a well-developed and well-resourced (white) system of education but, at the same time, “... Millions of South African children and youth [were] learning in school conditions which resemble those in the most impoverished states...”. The majority were excluded from meaningful educational opportunities.

Chapter 4 of White Paper 1 lists some of the values and principles that “should drive national policy” (paragraph 1). All citizens irrespective of race, class or gender should have “the opportunity to develop their capacities and potential, and make their full contribution to this society” (paragraph 2). There is a need for “redress of educational inequalities” among the sections of the population who have “suffered particular disadvantages, or are especially vulnerable...” (paragraph 7).

Section 1 of the Constitution of the Republic of South Africa of 1996 (Republic of South Africa, 1996) (hereafter the Constitution) articulates the founding values of the Republic as one, sovereign, democratic state founded on amongst other things the values of human dignity, the achievement of equality and the advancement of human rights and freedoms. The realisation of these values could counter possible feelings of exclusion.

Section 9 (the equality clause) provides that neither the state nor any person may unfairly discriminate against any one on one or more grounds including race and language (Subsections 3-4). Subsection 2 provides for (affirmative action) measures in respect of persons or categories of persons disadvantaged by (past) unfair discrimination.

In terms of Section 29 (1) (a) everyone has the right to a basic education. The Constitution is silent on the precise meaning of “a basic education” but it can be taken that Subsection (1), by necessary implication, makes provision for equal access to educational opportunities. An analysis of Section 3 of the South African Schools Act (Republic of South Africa, 1996a) (hereafter SASA), which deals with compulsory school attendance, suggests that basic education could be viewed as education from Grades 1 to 9.

Section 1 of SASA defines a school as an institution “which enrolls learners in one or more grades from grade R (Reception year) to grade twelve”. Early Childhood Education is a notable omission from the definition of compulsory school attendance in Section 3 and this exclusion could prevent learners from making proper use of educational opportunities (Beckmann & Phatudi, 2013).

The Constitution also does not provide that basic education should be completely free. Section 39 (1) of SASA makes provision for the levying of compulsory school fees by the Governing Bodies of certain schools. Schools have been divided into five funding quintiles corresponding with their relative levels of

poverty and quintiles 4-5 schools (the richer ones) may levy compulsory school fees but there is provision for exemption.

Subsection (2) gives everyone the right to “receive education in the official language or languages of their choice in public educational institutions where that education is reasonably practicable”. This right is, by necessary implication, also valid at universities that are not independent universities.

It is difficult to exclude a person from educational opportunities at public educational institutions on the basis of language. However, there have been four court cases dealing with allegations that the language policy made by the school governing bodies in terms of Section 6 (2) of SASA favoured Afrikaans and was used to exclude learners who wanted to receive education in English. It was only in the *Governing Body of Mikro Primary School and Another v Western Cape Minister of Education and Others* (332/05) [2005] ZAWCHC 14; 2005 (3) SA 504 (C) [2005] 2 All SA 37 (C) case that the court found in favour of the school and its language policy. The courts have thus protected learners against exclusion based on language.

Section 9 (3) (a) stipulates that “everyone has the right to establish... independent educational institutions that... do not discriminate on the basis of race...”. Private school fees are high and most parents cannot afford them. A learner’s socio-economic class may lead to exclusion from these educational opportunities.

Section 5 (5) of SASA provides that the admission policy of a public school is determined by the governing body of the school. Subsection (1) provides that a public school must “admit learners and serve their educational requirements *without unfairly discriminating in any way*”. (Emphasis added)

In terms of Section 6 (2) of SASA the governing body of a public school may determine the language policy of the school subject. Subsection 3 stipulates clearly that *no form of “racial discrimination* may be practised in implementing [language] policy”. (Emphasis added)

Post-1994 understandings of, and intentions regarding inclusion / exclusion

It seems that the first democratic government viewed inclusion as the unlocking of doors that had been locked before – an echo of the mantra of the Freedom Charter that the “doors of learning and culture shall be opened [to all]” (African National Congress, 1955). This approach involved repealing certain laws and discontinuing certain practices and creating new governance and management structures.

The previously racially-divided education departments were reduced to one with the creation of a *single Department of Education with 9 provincial departments*. (Emphasis added)

Current education law, policy and practice on inclusion / exclusion

The courts have declared that the right to a basic education for all is not subject to conditions and that it is “immediately realisable” (*Governing Body of the Juma Musjid Primary School & others v Essay N.O. and others* (CCT 29/10) [2011] ZACC 13; 2011 (8) BCLR 761 (cc) (11 April 2011)).

Matukane and others v Laerskool Potgietersrus (1996) 1 All SA 468 (T) was a landmark case about the refusal of a primary school to admit black pupils (wanting to be taught in English), adducing that they would not respect the (Afrikaans) culture of the school. The court disagreed and ordered that the pupils be admitted to the school. This case ruled out race, tradition or culture as mechanisms for excluding learners.

The state is following a deliberately “pro-poor” approach to school funding to remove certain financial barriers. School fees may not be levied in quintile one to quintile three schools (the poorest ones). In 2015, in terms of the National Norms and Standards for School Funding (NNSF), the state allocated approximately six times more money *per capita* to the “poorest schools” (quintiles 1 to 3) than to the “richest” for expenses excluding educator salaries (Department of Basic Education, 2015).

In higher education the state created a student financial aid which provides bursaries to qualifying students in need of financial aid in terms of the National Student Financial Aid Scheme Act (NSFAS), 56 of 1999 (Republic of South Africa, 1999). On an academic level, the state has introduced a number of redress measures (meant to counter the effect of poor schools on learners’ chances of gaining admission to higher education) such as racial targets or quotas regarding admission to higher education.

The effect of the legislative and policy provisions and practices on inclusion / exclusion

Today between 75% and 80% of South African schools are “dysfunctional” and are not able to impart the necessary skills to students (Wilkinson, 2015).

Statistics South Africa (no date) published a monograph (based on the 1996, 2001 and 2011 National Censuses) titled “A profile of education enrolment, attainment and progression in South Africa”. This monograph enables one to judge the “extent of achieving the goal of universal access to education” (Statistics South Africa, no date, p. 12).

In regard to the *proportion of persons aged 5-24 years attending an educational institution* the monograph reflects an upward trend for all groups, black Africans from 71 to 93.9% and whites, rather surprisingly, from 70.5 to 77.7% (Statistics South Africa, no date, p. 13).

The Net Enrolment Rate (NER) for the Foundation Phase increased by 29 percentage points and that for the Further Education and Training Phase (FET) by 16 percentage phase. Population group-specific NERs show that the NER for the Foundation Phase increased the most for whites followed by black Africans. For the FET phase the NER for black Africans grew the most followed by coloureds (Statistics South Africa, no date, p. 15).

The *National Gross Enrolment Rates (GERs) by census year and educational phase* (Statistics South Africa, no date, p. 20) show that most phases had GERs of more than 90% (which is approaching “universal access for the official age group” (Statistics South Africa, no date, p. 13). The GERs generally showed an upward curve. The Foundation Phase is an exception but has nevertheless grown from 58 to 78%.

The *GERs by population group and educational phase, Census 2011* (Statistics South Africa, no date, p. 20) indicate that, except for the Foundation Phase, the GERs for all population groups appear to be 100 and more, those for black Africans being the highest.

The *National Age-specific Enrolment Rates (ASERs) by population groups*, (Statistics South Africa, no date, p. 23) indicate that, relative to other groups, fewer coloured children (aged 4-6) are enrolled for Early Childhood Development (ECD) and in the Senior and FET Phases (children aged 15-24).

A *time plot for proportions of persons completing the next level by population group* (Statistics South Africa, no date, p. 64) reveals that the proportion of persons completing Grade 12 after Grade 9 moved upwards for all population groups from 1950 to 2010. The proportions of persons completing a bachelor's degree after completing Grade 12 reflected an upward trend for whites and Indians. The trend for coloureds reflected relative stagnation while that for black Africans reflected minimal growth between the 1980s and the 1990s and a downward trend from there up to 2010.

It would appear that black Africans (67%) and coloureds (6%) are relatively under-represented in higher education while whites (18%) and Indian/Asians (6%) may be somewhat over-represented relative to the entire population (Department of Higher Education and Training, 2014, p. 9).

The *percentage distribution of average undergraduate success rates* (Department of Higher Education and Training, 2014, p. 16) shows that the average undergraduate success rate was 80.3 % for contact students, no population group being below 76%, the set medium-term target (Department of Higher Education and Training, 2014, p. 16). There is still a considerable gap between black Africans and Whites and Indians/Asians.

Some emerging understandings / perceptions of exclusion

The above statistics suggest progress in regard to access to educational opportunities. However, feelings of exclusion persist and new understandings thereof are emerging. These understandings appear nebulous and fluid and are perceived as a force comprising *inter alia* attitudes, cultures and styles that still prevent learners (students) from making use of the educational opportunities available to them.

In the past, "White" education was the proverbial "trophy in the glass case" for the disadvantaged who believed that quality education was only available at "white" educational institutions – off-limits to people of colour. The fact that many learners are not able to access education at formerly white institutions today, that they cannot be "there", leaves a perception that they are still excluded from quality education.

Last year an independent school near Pretoria (Curro Roodeplaat) caused a furore when it put students who preferred English medium (mostly black Africans) and those who preferred Afrikaans medium (mostly whites) in separate classes. However, none of the protesting parents of colour complained about the quality of education (Nel, 2015).

The perception is frequently that learners in the approximately 80% dysfunctional schools in South Africa (corresponding with black African and

coloured demographics and poverty indicators) are inevitably doomed to inferior education. The quintile system and fee exemptions have not allayed such fears.

During the last two weeks of February 2016 some university campuses were subject to violent student protests demanding amongst other things that “Afrikaans must fall” (be removed, which appears to be in conflict with Section 6 of the Constitution, the language clause). The students believe that fellow-students who are taught through the medium of Afrikaans by Afrikaans mother tongue speakers are advantaged (Nel, 2016) compared to students who are not taught in their mother tongues by lecturers whose mother tongue is often not English.

The institutional cultures and climates of some higher education institutions are also experienced as exclusionary, hurtful and anger-provoking and reminiscent of an oppressive past. Kruger (2016) refers to demands made by the youth branch of a political party that anything related to Afrikaans at the University of Pretoria be destroyed.

Understandings, demands and realities

Some demands ostensibly made in light of the feelings of exclusion are problematic because they simply cannot be met. An expectation that all learners can be taken “there” where whites were educated in the past is not realisable. There are not enough places at former white institutions and the number of “Afrikaans schools” has been decreasing annually (Klopper in Nel, 2016b). However, the perceptions regarding culture and climate probably deserve the urgent attention of the management structures of the institutions concerned.

Conclusion

The new understandings of exclusion are not properly defined yet and will probably be harder to address than the discrimination of the apartheid era. The feelings of exclusion can probably only be properly addressed by the achievement of demonstrable parity of performance in all educational institutions.

This paper is limited in the sense that I can, because of a lack of research data, only offer personal observations and tentative conclusions. However, a very important, complex and challenging field of research and debate is emerging. A better grasp of these emerging understandings of exclusion might influence the extent to which South Africa will be able to address and overcome her challenges and use her opportunities.

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Anna Czyż

Educational and Social Inclusion of Handicapped Children. Polish Experiences

Abstract

This paper is dedicated to a very difficult and important subject – inclusion. Removing barriers, spreading social awareness and firmly established assistantship-guidance: these are the pillars by which inclusion is no longer an idea, but it becomes a process of creating a modern model of human functioning in the world. This pattern is primarily based on a respect for, and an understanding of human rights. Particularly sensitive to the idea of inclusion is a broadly defined area of education. It is a place where the human is preparing for life in the society, shaping personality, acquiring knowledge, competencies and skills to find their way in the modern world. That is why it is so important that every person can participate on equal terms in the learning process, and this process takes into account the capabilities and abilities of individuals.

Keywords: special education, inclusion, integration, disability

Introduction

Social functioning of people with disabilities is included in two concepts. The first one usually correlates with a negative or positive, but masked attitude towards people with disabilities – it is based on segregation practices, including the pseudo-integrated practice, which has roots in ancient times (Czyż, 2014). This is the concept of functioning homogeneous communities, according to which people with disabilities only in such an environment, will not be subjected to the lack of understanding, aggression or derision. The second concept, correlating with an open and positive attitude but often functioning at the border of triangle drama, where we are dealing with a distorted form of help, is called in the literature the ‘concept of integration’ (Ruka, 2009).

Considering the above, in the modern world full of competition and in the constant pursuit of material goods, we can observe two approaches to people with disabilities – the first based on ignorance and not paying attention to the needs of others, the second totally different – offering support and even sacrifice, but taking into account the specific conditions (Baylis, 2002). Neither the isolating approach nor the integration model is beneficial for people with disabilities. In both, it lacks balance and above all “averageness”. The first approach excludes people from society and reduces the biopsychosocial functioning of human beings, the second engages people into society, but at the same time it forgets that these people are full members of the society. The implication of efforts to balance these approaches is inclusion. Inclusion is based on the idea of equality and assumes that disability is not a basis for exclusion, but the “emergent-growing-uplifting” variety, which is a prominent feature of every human being, such as hair color, race, religion or gender, and each member of society is different – not worse or better, but requires the specific circumstances of the functioning in a spirit of understanding, respect and

acceptance. Support for the functioning of that involves creating adequate conditions to the specific needs (Martz, 2004).

Awareness, knowledge and spreading the idea of inclusion

In the process of inclusion a special place occupies awareness of social needs, which affect social relationships, determines development opportunities and proper functioning, shapes the system of norms, values and affects the self-esteem of the individual. The personality and capacity of people, which is shaped by social interaction, implies self-esteem, the way of self-realization, the sense of authorship, making choices including own career paths, going into social roles, transferring the system of education and culture to the next generation. Social attitudes determine the quality of life of people with disabilities, but often “society cannot cope with the creation of conditions and developing appropriate skills in these people” (Żółkowska & Wlazło, 2009, p. 481).

The results of inclusions depend on the environment. Social forces may enhance the beneficial effects of rehabilitation, but also or primarily deteriorate the quality of life of people with disabilities. Deeply rooted in the culture and traditions, the practice of segregation cannot, however, in the era of the twenty-first century, be an excuse for a lack of empathy and understanding of basic human rights. They cannot be the reason for the marginalization or even social exclusion of people with disabilities. Spreading awareness and appropriate attitudes will activate the social potential of the inclusion, as Kowalik (1999, p. 160) believes, in any environment, there are powerful forces conditioning process of improvement. Discovering it and strengthening liberate society from many years of practice-based stigmatization.

In the context of education, the greatest deficiency correlates with a low level of knowledge and social competence, as well there is observed the lack of willingness of the school environment for the joint education of people with different development needs. This is due mainly to the lack of experience in working with disabled people and a low level of specialist trained in this field. As reported by the study, despite increasing public awareness, still the concept of inclusion on the basis education is not understood nor is included in the policy of integration. A child with a disability, even though the law can and should implement compulsory education in any educational institution, most often goes to schools or departments of special integration. The child becomes the object of the competition in the struggle for posts and finance, and their needs are often the last element of choice for a development path. At the same time, the study shows that children with special educational needs are best cared for in specialized profiled institutions, they “die” in mainstream schools, even when the schools are implementing a policy of integration. Here, even more than in special education, we can be aware of the lack of personnel preparation to work with pedagogical expertise, which exacerbates the problem of understanding the specifics of the disabled person. It creates the appropriate conditions, and setting goals tailored to the real possibilities of the disable person.

Regardless the type of school, inclusion is often not the idea springing from the needs and actual realization of its objectives, but of compulsion. Until the sincere desire, not legal regulations, are the reason for its implementation, it will not be effective (Czyż, 2013).

Barriers and their removal

Shortage of knowledge and awareness, social reluctance and closing on the idea of inclusion in the confrontation with the needs of disabled people is the reason for the formation of various barriers. Environmental limitations of persons with disabilities should be divided into: situational, institutional and dispositional. The most important factors creating barriers include: low level of knowledge and public awareness implying social isolation, errors in the system of support and development of people with disabilities and their families, lead to their insufficient preparation to perform social and professional roles, insufficient material resources, which are corresponding with disabled people needs.

Situational barriers are related to environmental conditions occurring at a certain time, which limits the ability of the person to access higher education. The primary may include eg. the cost of education, liabilities affecting the lack of time to study, lack of support – assistant, transport capacity, architectural barriers. While institutional barriers include practices and procedures that may discourage or exclude a child from education. The barriers in this category include bureaucratic problems, social attitudes with regard to the level of consciousness, individual requirements and the lack of adequate information about the possibilities of making education at a certain level. Barriers include disposable psychophysical predispositions, including the type, degree of disability, age, emotions, coping strategies in different situations and others (U.S. Congress and the Secretary of Education, 2012). Removing barriers means providing opportunities for personal progress, development of the personality, promoting the development and passion, finally providing a decent existence. It is conditioned by the level of social openness and the creation of maximum customized training conditions. This is putting pressure on the preparation for adulthood based on individual educational trails, where it is combined both passions, capabilities and needs of the subject. It is also creating a system of financing to support the development, in terms of investment, which will result in energy independence of assistance institutions in the future.

Counseling - support

To make good educational decisions people with disabilities can and should benefit from the support of skilled professionals, which in adulthood will result in the possibility of self-realization, gaining autonomy and independence. The goal of guidance and assistance for people with disabilities is an insight into themselves and clarifying the possibilities and expectations, by identifying their aptitudes, interests, but also the possibility of taking into account the specifics of the labor market and economic conditions.

The main goal of Polish counseling is to catch up to European Union standards in the context of keeping individual paths selection and career development, taking into account the specific nature of disability and the resulting individual skills, abilities and interests (Wojtasik, 2009, pp. 491-501; Waddington, 2010, pp. 88-106). English studies show that advisors cooperation with disabled persons, collective planning, modifying educational paths, promoting suitable choices and the pursuit of real benefit, truly improve the social and professional situation of young people with disabilities (DCSF / DH, 2007). The Danish and Dutch experience confirms that the

policy of education and employment of disabled people becomes a global solution. Implemented solutions must be based on the real possibility and must take into account the requirements of the labor markets. It is noted that the combination of capabilities, interests and requirements of the market, as well as the policy of social support of disabled people in different countries, is a very difficult procedure, and in some cases even impossible (Høgelund, 2003; Żółkowska, 2005).

In Poland, as in other European countries aims of counseling – achieving self-reliance and self-sufficiency at the feasibility of their own interests – are possible through the activities on global and theoretical levels, which can be found in the regulations and statutes of the Ministry of National Education and Sport. It describes the principles of public psychological-pedagogical out-patients clinic, including public clinics and specialized local, which can be realized through:

- educational classes for children and teenagers;
- curriculum and educational profile;
- cognitive stimulation and integration into the labor market with the opportunity to gain work experience;
- cooperation with employers;
- individual counseling and professional development (Wojtasik, 2009, p. 496).

However, the lack of actions can be still observed in the field of counseling in support of the development people with incomplete efficiency. Statistical data on education and employment of persons with disabilities testify the low efficiency of interactions that provide consulting and activating. As reported studies in Poland more than half of the disabled have only a minimal education level – primary, secondary and vocational education (vocational 27.8%, lower secondary 1.9%, primary 33.2%). Higher education has an 8.1% disabled, post-secondary education 1.5%, average 23.8, and 3.7% without any education. However, since the 90s of the last century it is observed a significant growth rate of the number of people with disabilities to undertake training at a higher level. Over approx. 10 years there has been a 20-fold increase in people taking their studies at academic level (Ciepiłowska, 2009, p. 30). Importantly, just highly skilled persons constitute the largest percentage of employees with disabilities – 28.5% (who on the Polish labor market account for only 14.8%) (Kukulak-Dolata & Sobocka-Szczapa, 2013, pp. 11-27).

The causes of this situation, associated with a very small percentage of people with disabilities in the labor market, should be found in the social constraints including access to education, but also all of inadequacy selection of methods, forms and direction of education to the opportunities and psychophysical predisposition individuals. Even the choice of school at the primary level or secondary school is usually dictated by place of residence, without taking into account individual learning profile. Career choice in most schools is deferred to the level of upper secondary education. Studies also show that about 18% of persons with disabilities realize compulsory education in non-compliance with the recommended form of education, and at the level of primary school the percentage of such students reaches 45.6% (Chrzanowska, 2001, p. 392). There are not only doubts about the appropriateness of educational path, but also doubts about the quality and effectiveness of education people with disabilities, which often does not create adequate conditions for the development. As shown by the evaluation reports, on the

one hand educational inclusion enters to the ground Polish schools and even includes children with profound intellectual disabilities, on the other hand, education is not creating adequate conditions for the development for those with disabilities (Czyż & Gałuszka, 2016).

The expectations of people with disabilities

Expectations of students with disabilities in the context of inclusion implemented on the basis of education are conditioned primarily by their own development needs. The basic include the removal of external barriers that make it difficult, sometimes even impossible functioning and self-fulfillment including architectural barriers, removing psychosocial barriers through spreading knowledge about the specifics of disability, organizing sessions, meetings and interpersonal training. Great importance pupils and students with disabilities attach also to make changes in the rules and curricula, and training of teachers and lecturers. Besides eliminating extrinsic barriers, students are demanding a system of psychological support, counseling, and providing access to assistants and intensive help in solving problems (Pilecki, Olszewski & Parys, 2000, pp. 109-110). The priority in the functioning of education is the unblocking the access to it, but with a narrower choice of direction dictated individual ability of entities to remove barriers – particularly of architectural and social barriers including raising awareness and sensitivity to the environment. It also calls on introduction of alternative forms of teaching using modern technology, including distance learning (Kwaśniewska, 2006, pp. 135-136). In addition the process of inclusion is connected to the skills of bringing adequate support from consideration of readiness of the disabled person and their expectations, as well as increase the professionalism of staff and provide adequate teaching facilities and the friendly environment (Witek & Kazanowski, 2006, pp. 140-146).

Local education policy and the global

European countries, including Poland, support jointly established laws which meet the needs and expectations of people with disabilities in education: university education and continuously. It allows the acquisition and improvement of professional qualifications. Academies, universities, colleges and others of European Union are trying to assist the functioning of individuals with disabilities mainly through financial support, partly or totally refunding costs for disabled who require the organization of special equipment and teaching aids, the support of a personal assistant, accommodation and travel costs. In some countries, the registration fees and tuition costs are reduced, and these people are provided priority in enrollment (eg. Germany), ensuring that the chosen direction is consistent with the psychophysical possibilities and a medical certificate. Unfortunately, there is still unfavorable division of disabled people according to the criterion of age – for children and adults, where the lack of patency in the system of broader care and support (Waddington, 2010, pp. 88-106).

In Poland, there is a system of university cooperation inter-linked under the relevant agreements with the city authorities, which operate these institutions. This allows better access and faster exchange of information, but above all four taking

initiatives to improve the quality of education. Polish universities support people with disabilities with Office for Persons with Disabilities. Assistance is offered in the form of: sign language interpreters, assistants, courses orientation, adapting teaching materials, remedial classes, language courses, psychological support, guidance counselor, and consultants for crisis situations, promoting the activation of students through participation in conferences, programs and scientific projects and very popular internship programs. Each person can apply for financial help in the form of a scholarship. It is also granted on an equal footing scholarships (<http://www.up.krakow.pl/main/?page=regulaminy>).

Conclusion

Bridging social inequalities should be a priority activity of any highly developed country (Leicester, 2000). Policies promoting awareness of the process of inclusion, including access to education, implementation the obligation of education, skill sets and reaching educational goals according to the needs and capabilities of the individuals should occupy a place among the most important tasks that determine the modern system of education. It creates not only a real environment, but also lays the groundwork for the education of the next generations: generations operating in another world, the time of crossing borders, abolition of division, inequality and injustice. It determines the possibility of entering into social roles and the opportunity to participate fully in work, family, culture. The educational process should provide the same opportunities for personal progress, promote the development of passion and personality, finally provide a decent existence in conjunction with the possibilities and needs of individuals.

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Part 6

Research Education: Developing Globally Competent Researchers for International and Interdisciplinary Research

Johannes L van der Walt

Observations about Research Methodology during 15 Years of Presenting Capacity-Building Seminars

Abstract

In this paper, the author shares some of his most important impressions and experiences that he accumulated over a span of more than 15 years of facilitating courses in the foundations of scholarship and article-writing. This is done in an effort to stimulate discussion about the “art” of article-writing and also to help budding academic article-writers to come to grips with this art.

Keywords: scholarship, foundations of science, writing of scholarly articles, academic capacity building, budding scholars, theory building

Background

After my retirement at the end of 2000 as Dean of the Faculty of Education of the former Potchefstroom University in South Africa (now known as the North-West University), I became involved in various capacity-building projects at the three campuses of the North-West University and at several others across South Africa. This involvement is of two kinds: (a) presentation of article-writing seminars in Faculties of Education across the country, and (b) presentation of a basic course in Philosophy of Science for newly appointed lecturers at the North-West University, a project that I have been involved in since 1977.

My involvement in these two projects has brought me into contact with young(er) colleagues from a variety of disciplines trained as scholars at a multitude of institutions of higher education, both in South Africa and abroad. The attendees to these courses and seminars come from all university post levels, from basic researchers to senior appointees who, for instance, left banks, commerce, engineering or other professional fields to become university professors. My encounters with all of these colleagues over a span of 15 years in the case of the article-writing seminars, and a span of 38 years in the case of the basic course in Philosophy of Science have constantly added to my insight into how young and not so young scholars have been trained for the profession of university lectureship, particularly for the task of doing research and writing scholarly articles based on that research.

The purpose of this paper is to share some of my impressions about the training of scholars, in particular to express concern about some of the aspects that I regard as shortcomings in their training. I do this in the hope that by highlighting some of the problems that I have encountered we could reflect on how to address these shortcomings so that future generations of scholars might benefit from our reflections.

Some impressions

The “bottom drawer”

Whenever I meet for the first time a group of academics convened for the purpose of learning to write scholarly articles, or to actually write articles under my accompaniment and facilitation, I invariably discover that practically each one of them has one or more articles lying in the bottom drawers of their desks. Closer inspection reveals that many of these articles embody some of the authors' very first efforts at writing a scholarly article and that their work had been rejected by either the editors of journals or by the reviewers employed by the editors. In some cases, the remarks about their work were of such a negative and disparaging nature that the authors felt quite discouraged about the prospect of ever writing a publishable article.

My usual reaction to such discoveries is to encourage the attendees to take those articles out of the bottom drawer and let us see how we could change and improve them to become publishable – at least, in principle. In my experience, the eventual publication of the articles that previously had been rejected by editors and reviewers had a very positive effect on the attitudes of the article writers in question.

I raise this point about the articles in the bottom drawer for the specific purpose of drawing attention to the fact that editors and reviewers in general do not reject articles on spurious grounds but rather on the basis of serious shortcomings in the submissions. (This underscores the fact that many academics could benefit from taking a course in article reviewing.) In the rest of this paper, I shall mention some of the shortcomings that I have detected in draft articles through the years.

Poor English

Although I am not a native English-speaker myself and hence can hardly point fingers at others about their usage of the English language, I have observed through the years that the English used by prospective article writers has not been of the appropriate standard. I concede that writing an article in a second language is a daunting task. It is difficult to expound an argument in a logical and coherent manner in a second or foreign language. Much of my time and work through the years has gone into language editing, mainly for the purpose of helping me as a facilitator to understand what the author actually wished to convey. This is not only a problem in South Africa; I had much the same experiences with the work of the Koreans who continued their advanced studies under my supervision. Through the years, I have seen many instances of Setswana, Afrikaans, Korean or Russian (et cetera) thinking formulated in English words. In addition to this, there has been a movement in recent years for “African English” to be given the same status as United States, New Zealand or Australian English. It is clear from reviewers'

reports, however, that African English will have a long journey before becoming acceptable.

I mention this language problem to convey my concern that if article writers are not able to put across their thoughts in a lucid and coherent manner, they might experience problems in addressing all the research methodological problems that I mention below.

Structural shortcomings

Many articles seem to be rejected because of structural shortcomings. Some journals are very prescriptive about what structure articles should adopt, and rejection on the basis of incorrect structure is inexcusable in such cases. Most journals are not as prescriptive, however, and leave it to the authors to decide on the best structure. The problem here is that most of the fledgling authors have not had any previous training regarding the structure of an article.

In order to be able to meet most of the structural requirements, through the years I have developed a structure which I encourage the attendees of my courses and seminars to follow. This standard or template structure enables reviewers of articles to follow the argument as it systematically unfolds. In some cases, reviewers state that while they value the structure, they would advise authors to change some of the headings or even omit some of the sub-headings. This occurs mainly with respect to reports on empirical research.

Failure to see the difference between the article itself and the research that it is a report of

In most cases, a scholarly article is a report on completed research. This is true particularly of articles reporting on empirical research that was done by authors or by their research team. Seeing the article as a report on research already completed has two implications. The first is that one refers to the research in the past tense, as something that occurred in the past and the results of which are now being disseminated to the scholarly community. The second is that one should be acutely aware of the distinction between the underlying research being reported on, and the article which is the report thereof. This distinction will help the author to avoid inane statements such as: "The purpose of this article was to determine the extent of the change that took place as a result of the application of teaching method X". The purpose of the article is in fact to *report* on the *research* that was done to determine the extent of the change.

While it is easier to make this distinction in articles that report on empirical research, it is somewhat more problematic in the case of articles that reflect the thought processes of the author as they unfold, as in the case of an argumentative or conceptual article or one that defends a contention.

Either too little or too much guidance from supervisors

In many cases, the articles written during the article writing seminars that I present flow from dissertations (Master's studies) or theses (Doctoral studies). In some cases, articles reflect the complete underlying studies for the degree in question, and in others, they focus on particular parts of the underlying studies. This in itself is a challenge because reviewers are hesitant about approving articles that

have been drawn from either a dissertation or a thesis. Measures have to be taken to “hide” the fact that the underlying research reported in a particular article has already been disseminated in the form of a dissertation or a thesis. (I understand that this is not the case in some other regions, such as North-America.)

Of greater importance, however, is that the amount and the quality of the guidance a particular article writer had received from his or her supervisor (dissertation) or promoter (thesis) can be noticed in a draft article. In some cases, the supervisors / promoters had clearly given too much guidance, to the extent that the student had just executed instructions with regard to research method without actually understanding the rationale behind the choice of methods and the research steps taken. This becomes clear when an article writer is asked to explain the rationale for having applied particular research methods. Their supervisors / promoters had not created opportunities for them to explore the entire array of research methods and statistical techniques before helping them select the most appropriate ones. Other supervisors / promoters seem to have been guilty of giving too little guidance and advice; the students seem to have been left more or less to their own devices and insights. Also in such cases, there is very little insight into the rationale for choosing certain methods and techniques. There are, of course, exceptions to both these conditions; such colleagues seem to know which methods and techniques to mention and discuss in their articles and why those methods and techniques have been selected.

Since many of the colleagues who attend the article-writing seminars are on the way to becoming supervisors and promoters themselves, I usually make a point of emphasising that it is too late to be concerned about the choice of research methods and statistical techniques once one has reached the stage of article writing about the research findings. Such choices and selections have to be made when the research design is drafted.

The lack of a conceptual and theoretical framework

Similar choices and selections have to be made in the process of drafting a conceptual and theoretical framework. Article writing presupposes the presence of a well worked out conceptual and theoretical framework. When I began presenting these workshops in 2001, we discovered that many articles had no conceptual or theoretical framework, or just a short literature review (cf. Van der Westhuizen, Van der Walt & Wolhuter, 2011). The bulk of article content was devoted to detailed reports of previously conducted empirical research studies, very much in line with a positivistic approach. These articles tended to consist of detailed graphs, tables and figures and discussions, in many cases merely repeating the contents of the graphs et cetera in narrative form. Fortunately, after working with a large number of colleagues over the past 15 years, the idea has now taken root that article writers should have a conceptual and theoretical framework already in terms of the underlying research. Once one has reached the article writing stage, it is too late to be concerned about the construction of a conceptual and theoretical framework.

Conceptual and theoretical framework versus a literature review

When I began presenting article writing workshops, I found that many colleagues still presented “literature reviews” on the basis of which they launched

their empirical investigations. I devoted attention to this problem at every one of the workshops by emphasising the fact that a literature review forms only one of at least four steps in the construction of a conceptual and theoretical framework. I am glad to mention that my work seems to have paid off since nowadays I find that none of the colleagues who had ever attended one of my seminars seem to be satisfied with presenting a mere literature review. They now devote the necessary attention to each of the four steps in the creation of a conceptual framework: conceptual work, analysis and reflection of standard theories (the so-called literature review), the search for an over-arching “master” theory, and the ideal of developing a theory that could potentially gain universal recognition (e.g. Nussbaum and Sen’s capabilities theory; Rawls’ social justice theory; Habermas’ critical theory). These colleagues understand that they might never reach stage four of theory construction. They are prepared to work towards that objective, however.

Methodological confusion

Apart from the fact that attendees to my article writing workshops tend to confuse the terms “research methodology” (i.e. the specialised science or study of research methods) and “research method” as such (i.e. the method of doing actual research), I find that many of them are confused about particular distinctions in this area. This is not surprising if one takes into account that the standard text books in in the demesne of research method(ology) tend to differ as far as the use of terminology is concerned. What one author regards as a research approach the other sees as a research orientation; what one refers to as a research plan, the other sees as a research design, and so on.

I have decided to enter the fray by offering my own understanding of the terminology (see Van der Walt, 2015, pp. 403-409). I usually do not have the time during an article writing workshop to establish whether I have indeed added to the confusion by presenting my table of what I refer to as “difficult distinctions with respect to the different research steps” that a researcher must reflect on before even contemplating the writing of an article. In fact, I do not see the need to establish whether I have clarified the situation somewhat or further obfuscated it because decisions about research design and research methods belong to a previous phase, namely the research leading up to the article. My only hope is that the younger colleagues will grasp the importance of reflecting on these “difficult distinctions” and guide their own students to also reflect on them *before* arriving at the stage of article writing. Put differently, I tend to leave the choice of research methods to my colleagues who train young scholars about doing research.

Neglect of pre-theory and theory

Although this point is not directly connected to the art of article writing, it is difficult not to notice that attendees to the different workshops have rarely been adequately trained to reflect about the pre-theory (i.e. the philosophical foundations of their subject fields such as the ontology, cosmology, anthropology, epistemology, ethics, deontology and so on) of their disciplines. This neglect, I suspect, is part of the aftermath of positivism and empiricism.

Reflection about standard theories and theory development seems to get more attention, however, as mentioned above. The problem is that many article writers are

under the impression that the section of the article reporting on the empirical research is the most important part of the article, and that theory building (the conceptual and theoretical framework discussed above) is ancillary to the empirical research. My view of the role of empirical research might be slightly contentious. In my opinion, the term “theory building” is synonymous with “science”; science is theory building, I contend. The whole point of practising science is to construct theory and to test the boundaries and validity of extant theory by every ethically justifiable means possible. One of the means at a scholar’s disposal is to do empirical research. Research has a percolating nature: extant theory must be tested and validated (or falsified, as Popper insisted); this testing and validation can take various forms, including further theory development and also via empirical research. Put differently, empirical research is not done for its own sake or because of its intrinsic importance but rather as a test and validation of existing theory.

This circular argument about the relationship between existing theory and the testing, validation or falsification of theory through either further theory development or via empirical investigation has implications for the structure of an article. The most important implication is that the discussion section in the article should be tied back to the conceptual and theoretical framework. The discussion should reveal to what extent the theory outlined in the theoretical framework should be retained, changed, refuted or adapted.

Conclusion

Article writing represents the final stage of a research project, the stage where a scholar disseminates research findings to the scholarly community and attempts to add to the body of knowledge about a particular subject or knowledge field. In a sense it is the tip of the ice-berg; much must have already been done in preparation for this final stage of article writing. Unfortunately, as my experience has shown, this preparation is not always of the desired standard. However, if I may end on a positive note, I can attest to the fact that there has been a marked improvement in eradicating many of the shortcomings mentioned above over the past 15 years that I have been involved in article writing training and seminars.

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Anna Mankowska

Using a Play-Based Methodology in Qualitative Research: A Case of Using Social Board to Examine School Climate

Abstract

Little, if any, examination of using play-based tools to examine children's opinions in research exists in the current literature. Therefore, this paper is meant to address that gap within the literature and showcase the study about the use of a specific play-based methodological tool in qualitative research. This specific tool called social board was developed for the purpose of a research project, which was carried out as part of my doctoral thesis. The main aim of my doctoral thesis was to identify the socio-cultural value system of Norwegian elementary school children. In this paper, I discuss the basic assumptions of a play-based methodology, which combines pedagogical and psychological approaches. In fact, this methodology has inspired the design of the social board tool. Then, I present how this research tool was developed and used in practice. I also indicate some of the strengths and limitations of the research tool. Ultimately, this study provides empirical evidence supporting the social validity of play-based methodological tools such as the social board.

Keywords: play-based methodology, play-based assessment, school climate, school culture, social board tool, qualitative research

Introduction

Every researcher who examines school climate through qualitative methods such as school ethnography, becomes an attentive observer of every interaction that occurs in the research field. However, sometimes the observations are not satisfactory for a researcher and that is precisely what I have experienced. During my thesis research, the goal of which was to recognize the socio-cultural value system of Norwegian elementary schoolchildren, I developed a specific type of a play-based methodological tool called a *social board*. Assuming that school will never be free of cultural influences (Bruner, 2006), I used observations to assess school climate and school culture. In the course of the study, I found it necessary to use the tool in question in order to analyse and interpret the data.

I conducted a school ethnography, which belongs to the category of qualitative research. The observations spread over three months period whereas the social board tool was used one time as a supplement to the observations. The social board activity survey was undertaken by 1st – 4th grade pupils from one Norwegian school, located in the south of the country. The research tool was used to examine four elementary classes comprising approximately 75 students aged 7-11 years. The school was chosen randomly. The social board was used in the selected classes to determine (a) the democratic school climate and (b) a sense of community within the school based on students' sense of belonging.

When conducting research in the school, I had the impression that the group under investigation wished to say more and that my task was to find a common area of communication with them. Observations were not enough to gather desired data. Taking the specific character of the development of the youngest school children

(from 1st till 4th grade) who participated in the research, I decided to resort to an alternative tool based on a play-based methodology, which would enable me to obtain pupils' opinions (preferably all at once). I wanted to avoid personal interviews with children and also traditional questionnaire, as they may be time-consuming, confusing and stressful for examined group of pupils. At the same time, it was important to me to create a tool that would be well received by children. The main goal in creating a tool was to take into account their physical and cognitive development, social skills and previous experience.

As a researcher, I was concerned about the language barrier since English was not a native language for both, the participants and the researcher. Using a play-based methodology (where research tool is associated with fun rather than evaluation), helped children reduce a potential tension associated with overcoming the language barrier.

This study would not be possible without the assistance of trusted teachers from grade 1 – 4, who played a huge role in surveying the youngest school children with the use of the social board.

The power of play

The creation of the tool that I called social board was inspired by the previously mentioned challenges, scientific curiosity and belief – that play is as natural to children as breathing. It is also a universal utterance of children (Drewes, 2006) and perhaps the most developmentally appropriate and powerful medium for children to develop cause-effect thinking critical to impulse control, process stressful experience and learn social skills (Chaloner, 2001). Play can provide a child with a sense of power and control that comes from mastering new experiences. Play is a crucial activity for children's proper development and wellbeing. Through play activities children can communicate with adults including researchers or therapists without using words/language (nonverbally, symbolically or in action-oriented manner). Therapists or researcher can read through children's action and behaviour.

Play is often used as a therapeutic session and play-based assessments are part of therapeutic sessions. The use of play based methods helps establish a working relationship with children. A unique atmosphere of a playtime, presence of toys, and play materials tell children that they are given permission to be children and to feel free to be themselves (Landreth, 1993). Landreth (1991) states that the toys become children's words and play becomes the language, which foster greater understanding of their opinions and feelings. Through the play-based methods or methodological tools researchers can send a message to children of full acceptance and permission to be themselves without the fear of judgment. Winnicott (1971) notices that playing also allows a child to be an individual, to think and express oneself and to make one's own decisions.

Play-based methods and play-based methodology

Conducting opinion polls for children, including the young pupils (grade 1 – 4), is not an easy task. Until recently, not much has been said about the importance and possibilities of using play-based research tools (such as the social board) in qualitative research. It is worth mentioning that play-based methods, like for

example play-based observations or play-based interviews have been present in educational and psychological science since the 1980s (Farmer-Dougana & Kaszuba, 1999). Playing has been used in several ways to help children learn and discover their attitudes. For example, from many years therapists have used play-based assessments and techniques during therapeutic sessions to solve children's emotional, behavioural and school problems (Chaloner, 2001). Also teachers use play-based methods to teach in classrooms. Play-based methods are designed for children in different ages, even before kindergarten age, like TPBA (transdisciplinary play-based assessment) model designed by Toni Linder (1993). Shaefer and Drewes (2009) stress that play-based assessment and play-based methods afford opportunities to observe children in their most natural form which then allows to conduct play-based therapy. In that case the importance of play in examining children's attitude in any research seems to be crucial for better understanding and the best way to see the world through the child's eyes (to understand children's perspective).

The basic assumption of the play-based methodology is to create a research tool that is associated with fun rather than with study or evaluation. The aim of this type of methodology is to create an understandable and easy-to-use research tool. The play-based methodological tool must meet the emotional, cognitive, and physical development of children, which requires pedagogical and psychological knowledge. The play-based research itself needs to include play's features – this works similarly to a play-based psychological observation, in which a child is examined during playtime. It turns out that the major critique of a play-based methodology includes the following arguments: (a) the lack of strict research projects and analytical data methods (Philips, 1985); (b) the unreliability of research reports or the lack of control in terms of sample under investigation and the research itself; (c) at times, there is no control group and the community sample is too small for generalization (LeBlanc & Ritchie, 1999). I believe that the abovementioned assumptions could just as well be raised towards traditional methodology used to examine children's opinions and attitudes. It is well known that all research methods have some limitations.

It must also be taken into account that the use of play-based tools can be risky as children can simply start to “play a game” with the intention to collect points to win a game instead of following instructions of the researcher. This situation was addressed through teachers' involvement in using a play-based methodology and using in-depth knowledge about a group to see when a real playtime (collecting points) starts. As evident, teachers' role within a study became an invaluable initiative.

Experience of creating a social board tool

In the course of my observations, I noticed that schoolchildren used a dartboard during play-time and class-time. The board was well known to them and hence a simple dartboard served as a pattern to create a methodological research tool. The construction of the tool was very simple and thus the board became a good alternative to the traditional scale or smiley faces slider used to examine children's opinions.

The board depicted the research problem I wished to address. There were two main issues to explore: the democratic school climate and a sense of community within the school. The board consisted of four circles numbered from 1 to 4. I used a Likert-type scale, where scale follows: 4 – I strongly agree to 1 – I strongly disagree. Number 4 was placed in the center of the board, thus being the proverbial bull’s eye. As my goal was to investigate two issues, I printed out two boards on a different colours of paper to avoid the organizational chaos. The social board for democratic school climate was printed out on a green paper, whereas the sense of community board on a yellow one. Every student received two small boards and in addition, there were analogical bigger size yellow and green boards (one common for all pupils) displayed on the black board in front of the classroom. On the common board students marked their opinions one after another during the third stage of research (see below: *Stage three – marking the results on a common board*).

Different colours helped students to avoid organizational mistakes when they were asked to mark their opinions on the common board. It was easier to ask students for taking a board with them, reading and then marking opinion form “yellow paper dart” or from “green paper dart”, than to call a board by a name: “a democratic climate board” or “a sense of community board”. Simple and direct instructions were easily understandable for pupils (i.e., short instruction: “please take a green paper dart and come to the common board”).

The common board was hand-drawn by me, the researcher and the students on a big sheet of paper to increase students’ participation in a study and to make them familiar with the design of the board. A smartboard could be an alternative to the common paper board. During the research study, I tested both tools – the smartboard and the paper board. The traditional form, that is the paper one, turned out to work more effectively. When marking the smartboard, students tended to touch it with their wrists and leaving additional marks on it, which, interfered with the progress of the study.

Social board in practice

The research was conducted in several stages as described in the following text. During the stages 1 – 4 in which pupils worked with the tool I was able to evaluate the quality of the social board with the assistance of the class teachers. As I already mentioned, their assistance was of essence in conducting the study.

Stage one – familiarizing students with the tool and the purpose of the research

The first stage of the research involved explaining to students the workings of the research tool and the purpose of the research study. Along with teachers’ assistance, I familiarized students with the scale of the board and read out loud the questions written on the board. Students were asked to put different marks on the board according to their gender (girls put a dot, boys a cross), and to write their names.

In one of the classes, after receiving the instructions, pupils made sure that they understood it correctly, saying: “It’s like a dartboard, isn’t it?”. This means that the

basic premise of the play-based methodology (i.e., associating tools with fun) was fulfilled.

It is worth mentioning that I did not have to convince any of the teachers to use the tool. Unanimously, all the teachers considered it an interesting alternative to the traditional system of scales and smiley faces, which are typically used to examine children's views. It can be said that the play-based methodological tool defended itself and immediately gained acceptance. Teachers on their own initiative called the tool a social dart. They also suggested that it would be reasonable to use different colours of paper on the boards to facilitate the work of schoolchildren.

Stage two – working with social board

Every student received a green democratic school climate board and a yellow sense of community board. Children were asked to mark on them their opinions. Students could choose when they start and finish work thus they were working without time pressure. I did not collect the boards from the students, they were asked to put them aside when they were done. The students were told to inform the researcher when they were finished with the boards. However, in some cases when children finished their work, it was the class teacher whom they informed, not the researcher. I can assume class teacher's role (a trusted person) was important, especially for youngest groups (1st and 2nd grade).

Stage three – marking the results on a common board

Students who completed small boards were asked to come to the common board one after another and mark their opinions there (copy it on the common board). In order to make this activity more fun for students and thus use play-based method, they were picked to the board by using riddles or mathematical problems.

At this stage of the study the researcher and the class teacher took a closer look at students marking their opinions because younger children (particularly from 1st and 2nd grade) tended to follow the opinions of their classmates. At this stage a scrupulous attention of the researcher and teacher's knowledge about the group was essential as it helped to assess if students' answers were true. It is worth mentioning that students found the tool easy to use, as it was evident in their final comments: "It was easy" or "It was fun to say my opinion that way".

Stage four – summarizing the results in the classroom

At this stage it was the class teacher, participating actively in the research from the very beginning, who took the initiative. It was the class teacher's task to summarize the results and discuss them openly in front of the whole classroom.

Stage five – summarizing the results with the teacher, collaborative diagnosis

The researcher and the class teacher met together to summarize the study and exchange insights. This stage required a reciprocal, trustworthy relationship between the researcher and the class teacher.

Stage six – devising own research conclusions

During this stage, the researcher analysed and interpreted collected data.

Results

The play-based methodological tool has been proven effective in exploring the democratic school climate and a sense of community. The study showed that pupils found the tool simple and understandable. The fact that the tool was inspired by a board that the school children were familiar with, eliminated the element of surprise. Pupils needed just a short instruction to understand how to use it in all four stages. Most importantly, they did not associate the social board activity survey with unpleasant evaluation. In teachers' opinion, the social board was a great alternative to the scale or the smiley faces slider, which are most commonly used for surveying the youngest pupils.

The research has shown that it is not only pedagogical and psychological knowledge of the development and children's ways of thinking but also teachers' positive attitude and active engagement that are important in the creation and use of play-based tools. Teachers played an invaluable role and were of great assistance in this qualitative research. Their opinions and knowledge about pupils helped me as a researcher to assess children's moods and introduce to them the play-based tool. It would be less effective or more time consuming to use the board without their active involvement. I think that the presence of a trusted person is crucial in working with children.

Play-based methodological tools can be successfully used in qualitative research. In fact, employing the play-based methodology in this study become supplementary to observations as opposed to an independent technique.

One of the limitation encountered was the lack of computer software version of the tool which I mentioned earlier. An alternative to the paper social board could have been a computer software which would examine children's opinions or a multimedia tool such as a tablet. Using information technology with the use of applications on the tablet or the smart board could be very helpful in data collection. I intend to develop this idea in the future.

Conclusion

This research experience has shown that listening to the opinions and views of school-age children is not a simple task. Traditional evaluations such as observations, surveys or interviews often leave much to be desired. Traditional methods may be inappropriate, boring or unfamiliar to the younger pupils. Play-based methodological tools provide an interesting alternative to the existing evaluation scales. Throughout my doctoral studies, I discovered only a few opportunities that can be offered by the play-based methodology, which combine pedagogical and psychological approaches. This study showed that play-based tools can be used to explore students' views about different topics, in this case to examine democratic school climate and sense of community. I am convinced that social dart idea has many more opportunities and it should be fully discovered for the sake of the youngest groups of respondents.

Finally, to illustrate the efforts of this research study in practice, I wish to mention that after the data collection process in the school was finalized, I was asked for permission to allow the use of the social board within the school. I have been informed that the school has been using this tool to this day, mainly to acquire

students' opinions. This provides evidence that play-based methodological tools have a future and are worth developing.

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Abstracts

Part 1: Comparative Education & History of Education

Marzanna Pogorzelska

Project-Based Learning in Polish-American Comparative Perspective

In the presentation I am going to focus on my own research related to the Project-Based Learning. The research has been based on the experiences of introducing in Poland the projects of an American educational center (the Lowell Milken Center promoting the projects on “Unsung Heroes”). The realization of the projects in the examined schools inspired me to conduct a wider investigation of attitudes towards Project-Based Learning in Polish schools. Thus, the presentation will consist of three parts. Firstly, I am going to describe the model of conducting the projects worked out at the Lowell Milken Center as the example of American approach towards Project Based Learning. In part two of the presentation I am going to show, taking into account the whole socio-political context, the process of implementation of these projects in a number of schools in the south-west of Poland and the evaluation of the project realization. The results of this evaluation, obtained through in-depth interviews with teachers and students have been the starting point for me to do further research on the attitudes of Polish adolescents towards the realization of the projects with the use of Project Based Learning. The analysis of the results, based on quantitative data, will form the last part of my presentation.

Considering that the described projects can serve as model solutions for educators in Europe in introducing intercultural education in an innovative way, the presentation, with its comparative dimension, will show both the opportunities and limitations of implementation of the American idea on the European ground.

Keywords: project-based learning, American projects, Polish education

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Part 2: Pre-service and In-service Teacher Training & Learning and Teaching Styles

Juliana Smith

Teaching and Researching Intervention and Facilitation in a Process of Self-reflection: Scrutiny of an Action Research Process

This paper aims to explore a way of making connections between a research problem, a research process and a theory arrived at, through action research. Action research is viewed as a useful approach to pedagogic research in general. The

research focused on a particular action research project based on the intervention and facilitation of teaching and learning of pre-service commerce students by a teacher educator. The interaction was pursued through a continued dialogue between theory and practice. The research resulted in a principled, theoretical framework to describe and guide the interventionist approach of the teacher educator.

Arriving at the theoretical framework involved repeated cycles of interaction of theory with practice and required the integration of multiple theoretical perspectives. The theoretical underpinning of the teacher educator's intervention and facilitation of the teaching and learning of the pre-service teachers found legitimacy in the underlying philosophies of different theorists.

The paper provides a framework for intervention and facilitation for teaching pre-service students in higher education. It also illuminates the teacher educator's self-reflection on practice through action research as the research methodology.

Keywords: intervention, facilitation, theory-practice dialogue, pre-service teacher education, teacher educator, action research, self-reflection, professional development

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Ayşe Duran

Investigating Perceptions of Male Students in Early Childhood Education Program on Learning Experiences

The main problem of identification and perception of early childhood teaching is women-work. Male teachers should be a part of early childhood education as they may make important contributions to the field. The male students in preschool teacher training programs in Turkey have become the disadvantaged minority because of their percentage. The aim of this study is examination of learning experiences of male preservice teachers in early childhood education programs. The sample of study consisted of 9 male students in the Adiyaman University, Turkey. The data collected for this study included records from interviews to which content analysis was applied. According to results, in their learning experiences, male students have problems about lessons, communication with female students and lectures because of their gender.

Keywords: male preservice teachers, preschool education program, learning experiences

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Emine Gumus & Mehmet Sukru Bellibas

Teacher Professional Development and Student Achievement in Turkey: Evidence from TIMSS 2011

It has been well-acknowledged that improving teacher quality and teaching effectiveness is crucial for achieving educational goals. As a result, a persuasive

research has emerged which emphasize that the continuing development and learning of teachers are essential in improving the quality of schools (Borko & Putnam, 1995). Professional development, as defined teacher development in this study, means “the professional growth a teacher achieves as a result of gaining increased experience and examining his or her teaching systematically” (Glatthorn, 1995, p. 41). In the existing literature, professional development for teachers is also recognized as a vital and critical mechanism for enhancing teaching effectiveness and improving the instruction (Bredeson, 2000). However, the studies which investigate the direct relationship between teacher professional development and student achievement are limited (Blank & Alas, 2009). In this context, current study aims to explore the relationship between teachers’ participation in different types of professional development activities (e.g., content knowledge, pedagogy, IT integration etc.) and the achievement of their students. With this aim, multilevel regression analyses conducted by using Turkey’s data from 2011 cycle of TIMSS, controlling for several important student (gender and home education resources), school (school size, disadvantaged student population, and location), and teacher level (experience and level of education) variables. Results show that only professional development activities related to critical thinking is positively associated with student achievement. Several control variables – School size (-), disadvantaged student population (-), teacher experience (+), teacher level of education (+), student home education resources (+) – are also found to be significantly related to student achievement as expected.

Keywords: professional development, teacher quality, TIMSS, Turkey

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Part 3: Education Policy, Reforms & School Leadership

Yehuda Bar Shalom & Amira Bar Shalom

The Usage of CBT and Ayeka Approach at the Kedma School

In Israel, during the 1970s, an effort was made to promote ‘integration’ between population groups, on the assumption that an encounter between children from prosperous backgrounds and children from ‘weakened’ families, to use the term coined by sociologist Shlomo Swirsky (1990), would enrich the students from poorer families, most of whom were of Mizrachi (Jews who came from Arab counties) origin.

The policy of integration achieved some successes, particularly in terms of individual students who were able to achieve social mobility. However, a large number of students were left behind. In many schools, streaming resulted in the concentration of weaker students in classes that were considered inferior (Swirsky, 1995), leading to the emergence of tension among the students along social, ethnic, and class lines. This tension is the result of an unequal encounter (Swirsky, 1990).

One culture is perceived as better, hegemonic, and deserving of being copied, while the other as inferior, and should be rejected and forgotten. The preferential status of one culture over another was manifested, for example, in curricula that presented Jewish history from the perspective of an Ashkenazi and European narrative, almost completely ignoring the achievements and riches of the Jewish culture in the Arab countries.

The Kedma School was established as a framework in which the students, most of whom are Mizrachim and live in a neighborhood that is stigmatized due to its deprivation, will learn that they are equal to others and are able and entitled to advance their social status through education (Bowels & Gintis, 1976).

Keywords: CBT techniques, Ayeka approach, Kedma School, at-risk youth

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Factors Affecting Turkish Teachers' Use of ICT for Teaching: Evidence from ICILS 2013

The integration of technology into education has become one of the most common educational goals in many countries during the last few decades. Turkey is not an exception. Although Turkey's earlier efforts to integrate technology into education go back to the 1990s, the Turkish government started a new nation-wide initiative, FATİH Project (Fırsatları Artırma ve Teknolojiyi İyileştirme Hareketi – Movement of Enhancing Opportunities and Improving Technology Initiative), which aims to provide one tablet for each student and an interactive white board to each classroom (FATİH Project, 2012). This project is known as one of the biggest technology integration projects worldwide in terms of its budget and content. Despite this bold attempt of the Turkish government, existing research shows that there are significant problems in practice. Teacher or school related barriers, such as lack of infrastructures, shortage of related professional development activities, lack of managerial support, teachers' low motivation, perceptions on ICT usage, etc. impede teachers' actual integration of ICT into their teaching practice (Akcaoglu, Gumus, Bellibas & Boyer, 2015; Vatanartiran & Karadeniz, 2015). In this context, this study aims to investigate the school and teacher related factors affecting teachers' use of ICT for teaching purposes in Turkey, by using a large-scale data set, ICILS (International Computer and Information Literacy Study) conducted in 2013. A multilevel regression analysis was conducted by using 'teachers' use of ICT for teaching' as a dependent variable and several key teacher and school related variables as independent variables. The result showed that professional collaboration among teachers, their age and perceptions regarding the use of ICT, school location and size, and ICT resources at school are significant predictors of teachers' use of ICT for teaching.

Keywords: FATİH Project, ICILS, Turkey, use of ICT for teaching

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Part 4: Higher Education, Lifelong Learning & Social Inclusion

James Ogunleye

Application of Big Data Predictive Analytics in Higher Education

In the United Kingdom, the Higher Education Statistics Agency (HESA) is charged with the responsibility for collecting data from higher education colleges, universities and other providers of higher education. The data is provided to the UK governments and higher education funding agencies to inform state regulation, funding policy and mechanisms in the higher education sector. For many universities, however, the government-encouraged data-driven culture is generally seen as a compliance necessity – something that has to be done for reporting purposes. Thus, the potential use of internally-generated data remains largely untapped. The recent phenomenon of Big Data, a quantum increase in the amount of digital and physical data that exist and the innovation that surrounds the use of this data, has brought home the importance of analytics in the higher education sector. This is more so as an increasing amount of student data, especially on student learning, is fluid and the need to perform analytics on the data – for example, on student course selection, student learning, attrition, progression, achievement, satisfaction and destinations – becomes a critical necessity. The paper examines the phenomenon of Big Data more broadly and how analytics can be used to derive actionable insights from universities' own internally-generated data. The paper concludes that engaging with big data analytics will help universities to make better use of, as well as leverage their data assets.

Keywords: big data analytics, data-driven culture, higher education

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The Pursuit of Excellence in Malaysian Higher Education: Consequences for the Academic Workplace

Academic staff in Malaysian universities are coming under considerable pressure to increase their research and publication rates, largely from a government-initiated push to raise Malaysian university placement in international university rankings. This emphasis on research has translated into new pressures on academic staff, many of whom entered their profession when the emphasis was on teaching. This study investigated the manner and extent to which academic staff in Malaysian universities believe that these external pressures are affecting the nature of their

work-lives and their professional relationships with colleagues and students. The study is grounded in on Job Characteristics Theory (Faturochman, 1997) and Gappa, Austin and Trice's (2007) conceptual framework of the "essential elements" in academic work that relate to faculty members' satisfaction and motivation. Semi-structured interviews were conducted with 67 faculty members across two public research universities, two public regional universities, and two private universities in Malaysia. Data were analyzed using thematic content analysis to identify themes that emerged in the interview and to assess how frequently these themes were expressed. Findings indicate that the pursuit of excellence in Malaysian higher education is placing new and largely unwelcome demands on academic staff, though there are difference by institutional type. Many believe that the increasing external pressures on academic staff are eroding the quality of faculty work-life. Many believe that the increased demand for research and publication, viewed by government and university managers as the pathway to excellence, is largely disconnected from a meaningful or equitable reward structure. Although this study is limited to selected higher education institutions in Malaysia, the findings have wider implications in contributing to the understanding of governance and academic culture in the broader context of higher education.

Keywords: pursuit of excellence, Malaysia, higher education, academic staff

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Pepka Boyadjieva & Petya Ilieva-Trichkova

Challenging the Value and Missions of Higher Education: New Forms of Philanthropy and Giving

All countries around the world face the challenge of how to democratize access to quality higher education given the constraints of available limited public funds. A way out is sought by diversifying the sources of funding of education and the introduction of different cost-sharing models. Two recent developments in the sphere of philanthropy and giving have not only gained a lot of attention within and outside academia, but have also raised questions about the value and essence of higher education. The first one is the Thiel Fellowship, which is granted to students from prestigious universities not to attend college for two years and to develop business ideas instead. The second one is the so-called "philantrocipitalism" or "venture philanthropy". This new philanthropy is associated with extraordinarily wealthy people, who have donated a lot of resources to education, becoming at the same time powerful policymakers regarding it and thus creating threats to democracy. Against this background, the present paper aims at reconsidering the value and missions of higher education. Relying as a theoretical framework on the ideas of the intellectual inspirers of the German university model (Shelling,

Humboldt, Fichte) and on the capability approach, it argues that higher education performs a plurality of missions/roles and that it has not only instrumental, but intrinsic and empowering value as well. The paper develops a model of the roles of higher education, which highlights its intrinsic and empowering value at both individual and societal level.

Keywords: value and missions of higher education, philanthropy, giving, capability approach

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Jinmin Yu & Hong Zhu

The Effects of Major-changing between Undergraduates and Postgraduates on the Major Development of Postgraduates

By exploring the data of “Beijing Master Students Development Survey” (2014), through descriptive statistics, multiple linear regression, ordered logistic regression and path analysis, this study examines the professional current situation of the major-changing postgraduates (no changing, parallel changing, subject changing, category changing) and its influential factors and mechanism. The study concludes that:

1) The proportion of postgraduates who have different individual characteristics – such as gender, type of college, major type, recruitment and location and family – on the major-changing type shows a wavy line trend: no changing (15%-25%), parallel changing (35%-55%), subject changing (0%-15%), category changing (15%-25%).

2) With the increasing of major change degree, the professionalism of postgraduates is decreasing. Postgraduates of category changing are especially true. Although they have intense interest in their major, and make great efforts to make up for the major defects, their professionalism is still worse than other types of students, and the probability for them to achieve a high rank is lower. Moreover, the advantage of the multi-subject isn't manifested clearly.

3) Internal and external motivations can not only directly influence the professionalism and the development of innovative thinking of the postgraduates, but also indirectly influence them through professional interest, efficacy and devotion. Similarly, the influential degree varies with the postgraduates' different major-changing types. The study concludes with set a set of suggestions for positive outcomes for the individual student, their family and the college.

Keywords: major-changing, master students, major development

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Part 6: Research Education: Developing Globally Competent Researchers for International and Interdisciplinary Research

Ewelina Kinga Niemczyk

Spotlight on Canadian Research Education: Access of Doctoral Students to Research Assistantships

Graduate students' development as researchers is a key objective in higher education internationally. Research assistantships (RAs) have potential to nurture graduate students as novice researchers as they develop theoretical and methodological knowledge. However, few studies have investigated graduate students' access to and experiences with RAs and the ways that institutional regulations, informal practices, and students' academic status may influence such experiences. Based on a larger case study exploring RA experiences of full-time and part-time doctoral Education students at an Ontario university in Canada, this paper reports key arguments and conclusions regarding students' access to RAs.

Considering that the culture of the academy has embraced research as its highest value and that comprehensive universities have adopted missions to discover, produce, and share knowledge, it is somewhat surprising that RAs seem to be in the process of development in terms of organization and distribution at the institution under investigation. The multiple data sources considered in this study—the interviews with doctoral students, research supervisors, and administrators—highlighted how inaccessible RAs can be to some students, especially part-timers from distant locations. The results have also shown that institutional regulations and recruitment practices can hinder doctoral students' participation in RAs.

The study's findings offer quality recommendations to improve full- and part-time students' access to RAs. The results may help students understand access to RAs, assist academics in hiring research assistants, and inform administrators and academic program committees about possible organizational changes to be made. Although the study is context specific and cannot be generalized, described practices and recommendations can inform other institutions and programs nationwide about ways to enhance students' access to RAs.

Keywords: research assistantships, research education, doctoral students, Canada

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JP Rossouw & MC Rossouw

Regulation or Freedom? Considering the Role of the Law in Study Supervision

While the law traditionally has a regulatory function, suggesting structure and control, in a modern democracy the legal system also entrenches freedom as a fundamental right of all. On a continuum, with regulation and freedom on the

opposing extremes, supervising post-graduate students poses a specific challenge to study supervisors: in their research education provision they have to strike a balance between controlling and guiding the research process, while simultaneously affording the developing researcher a fair amount of freedom. Freedom, however, may unfortunately be perceived by some students as neglect (Bitzer, 2010: 48) or the supervisor being apathetic towards the research project. Strict regulation, on the other hand, may deprive students of independent critical thinking, thus hindering their development of proper scholarship and the creation of high-quality research learning environments (Bitzer, 2010: 26).

This paper argues that the law, if correctly understood and applied, can provide a framework for a balanced approach. A legal focus in research education literature, however, seems to be limited. Wadesango and Machingambi (2011: 32) refer to tort law based court cases in the United Kingdom where unsuccessful PhD students brought court actions against supervisors based on the latter's alleged neglect of their duty of care. This paper steers away from this retribitional characteristic of the juridical system, according to which courts or other tribunals are approached to formally resolve disputes.

The focus is rather on the positive contribution of certain legal principles towards a healthy relationship between supervisor and student, characterised by security and leading to a successful, timely completion of the study (Kiley, 2011: 588-589). A number of fundamental human rights serve as guiding principles, while contract law offers a number of measures that can be utilised to prevent complications in the supervision process. Bitzer (2010: 30) refers to "negotiated contracts" as a strategy associated with adult learning.

This paper argues that a fair amount of regulation, approached in a constructive way, can create a caring environment for sound education provision in Higher Education context. The argument is based on an ongoing empirical research project, which involves data analyses of interviews with students and supervisors, and a critical analysis of existing regulatory documents concerning formal agreements between supervisors and students.

The theoretical framework is developed from a number of relevant legal principles, such as fundamental rights and the law of contract. Guidelines are finally offered for properly drafted agreements which, if aptly implemented, can ensure and enhance the much needed freedom during research education processes of emerging scholars.

Keywords: regulation, freedom, supervision, law, higher education

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Gertrude Shotte

The Subjectivity-Objectivity Battle in Research

In traditional research dialogues, subjectivity and objectivity are often spoken of as being diametrically opposite to each other, where subjectivity is connected to the

traditions of qualitative enquiry and objectivity is aligned with quantitative paradigm. This paper takes a divergent view. It contends that it is the very essence of subjectivity that arms qualitative researchers with the insider knowledge, which is useful in interpreting participants' constructions and understanding a particular phenomenon. The paper challenges the post positivists' arguments that the methods and procedures used by qualitative researchers are in themselves subjective and therefore restrict the desired level of objectivity that makes their research work sound and credible. Similarly, the paper asserts that quantitative approaches are sprinkled with subjective elements such as reference to perceptions, critical analysis, and logical reasoning. Both scenarios seem to suggest that qualitative as well as quantitative methodologies do, to some degree, benefit from objective and subjective processes. The paper begins by examining accepted conceptualisations of subjectivity and objectivity and how they relate to those who are considered insiders and outsiders in the research process. Then, in order to support claims made, the paper brings forward four principal sources: (1) Bourdieu's habitus; (2) Creswell's four philosophical worldviews and their interconnection to research methods and approaches; (3) Nagel's theoretical notions of where truth can be found; and (4) author's personal experiences as a researcher. In addition, the paper brings attention to some perspectives of qualitative and quantitative researchers. The conclusion reveals that all researchers, consciously or unconsciously, bring to the research process a set of values that can enhance and/or distort basic truths.

Keywords: subjectivity, objectivity, habitus, positivism, post positivism, philosophical worldviews, insider, outsider, constructivism

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Margarita Stoytcheva & Roumen Zlatev

An Interdisciplinary Approach to Teaching Chemistry: Electrochemical Biosensors Case Study

Currently, the interdisciplinary approaches and convergence tendencies in modern natural sciences are considered as an undeniable fact, exemplified in numerous methodological and research works.

In this report, the interdisciplinary approach to teaching chemistry is illustrated examining the case study of biosensors. The biosensor is "an integrated receptor-transducer device, which is capable of providing selective quantitative or semi-quantitative analytical information using a biological recognition element". The biosensors are developed taking advantage of the progress in the biotechnology, the biochemistry, the material science, the analytical chemistry, etc., in association with the modern principles of transduction of the chemical information. Hence, the education in the area of the biosensors technology requires a great number of interdisciplinary actions, commented in this work. These actions assume the introduction of lecture concepts in conjunction with significant laboratory experience. Three lecture courses and laboratory sessions are presented in this report, with emphasis on the enzyme immobilization techniques, the electrochemical

methods of analysis, and finally, the electrochemical biosensors construction and application.

It was demonstrated that the biosensors technology represents an excellent example of successful combination of interdisciplinary knowledge and skills to generate new insights.

Keywords: interdisciplinary approach, chemistry teaching, biosensors

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