

Current Business and Economics
Driven Discourse and Education:
Perspectives from Around the World

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Preface

BCES: A Fifteen-Year Conference Tradition

This volume contains selected papers submitted to the XV Annual International Conference of the Bulgarian Comparative Education Society (BCES), held in June 2017 in Borovets, Bulgaria, and papers submitted to the V International Partner Conference of the International Research Centre (IRC) ‘Scientific cooperation’, Rostov-on-Don, Russia, organized as part of the BCES Conference.

The XV BCES Conference theme is *Current Business and Economics Driven Discourse and Education: Perspectives from Around the World*. The V International Partner Conference theme is *Science and Education in Modern Social, Economic and Humanitarian Discourse*.

The book consists of 38 papers written by 69 authors.

The volume starts with an introductory paper by Johannes L van der Walt. The other 37 papers are divided into 8 parts: 1) Comparative Education & History of Education; 2) Teacher Education; 3) Education Policy, Reforms & School Leadership; 4) Higher Education, Lifelong Learning & Social Inclusion; 5) Law and Education; 6) Research Education; 7) Educational Development Strategies in Different Countries and Regions of the World; 8) Key Directions and Characteristics of Research Organization in the Contemporary World.

Fifteen years ago, in 2002, when we organized the Inaugural BCES Conference, we had no idea what would happen in the future. The conference originated as a forum on Comparative Education and Teacher Training. However, throughout the years, other fields such as, History of Education; Education Policy, Reforms and School Leadership; Higher Education, Lifelong Learning and Social Inclusion; Law and Education; Research Education – have been included in the conference programs.

The BCES Annual International Conference has three main features:

1. It is our way of being an integral part of the global education community, our way of inviting the world to come to Bulgaria.
2. It is purposefully kept small as an event aimed at providing a homey environment, friendly atmosphere, and excellent opportunities for discussion.
3. Despite its size, it is always visited by participants from all over the world.

During the past fifteen years, the BCES Annual International Conference has, without doubt, been established as a traditional, prestigious and high quality event that habitually attracts colleagues from all continents.

May 2017

Prof. Dr.habil. Nikolay Popov, Sofia University, Bulgaria
BCES Chair, Editor-in-Chief, npopov@bc-es-conference.org

Introduction

Johannes L van der Walt

The Current Business and Economics Driven Discourse and Education: Perspectives from Around the World

Abstract

This paper sets the tone for the 2017 BCES Conference in that it confronts the educators and educationists assembled at the opening ceremony with some of the manifestations of the current business and economics driven orientation to life in general and to education in particular. It demonstrates how and to what extent the neoliberal life-view or orientation has so far colonized the minds of educators and educationists and affected their occupational environment. The paper concludes with a brief critical discussion of neoliberal tenets and their effects on education based on professional pedagogical insight into the human being, societal relationships and education.

Keywords: neoliberalism, education, school, university, academia, business, economics

Introduction

We are assembled at this Conference mainly as educators (teachers) and educationists (academics) attached to institutions of learning such as schools, colleges and universities. In this capacity, many of us have been confronted with phenomena such as the following in our work environment:

- Many of us have witnessed the commercialisation and corporization of our institutions of (higher) learning. Most of our modern institutions of learning have been morphed into businesses offering knowledge packaged and branded in the form of teaching programs for sale to interested clients. In a sense, our modern institutions of teaching and learning have become part of the knowledge industry (Conradie, 2011, pp. 424-432). Many of them see themselves as business corporations and hence have blatantly adopted business value systems, such as making profit in some sense (Rustin, 2016, pp. 150-156). According to Welch (1998, p. 157), such institutions have adopted the doctrines of economism.
- Many institutions of (higher) learning resultantly have succumbed to the demands of a consumerist culture and ethos (Conradie, 2011, p. 432, p. 439) and have become market-led and subjected to an individualistic rationality (Marois & Pradello, 2015, p. 1).
- Knowledge has been commodified and packaged in accordance with the wishes of the “clients”, the students. Lecturers are seen as “service

consultants and providers” (Conradie, 2011, p. 427). In sum, academics are seen – in typical utilitarian spirit – as social and human capital (Fevre, 1997, p. 3) who, together with their students are expected to constantly tend to their own present and future value in the market (Brown in Shenk, 2015). Learning is rendered as a “cost-effective policy outcome” (Ball, 2003, p. 218).

- Education (teaching and learning) is seen as a sorting and grading process; only those with the most “value in the market” can effectively enter the market (Rustin, 2016, p. 148). Like all other commodities, individuals have economic value; their value depends on the level of their skills and training, and the extent to which they might contribute to the economic growth of the country (Welch, 1998, p. 158). This neoliberal approach motivates students to be more interested in grades, qualifications and credentials than in holistic education in the sense of forming, guiding and equipping (Sparkes, 2007, p. 521). The common understanding that education and the economy are inextricably connected is reinterpreted as “education for economic growth, for purposes of the economy” (Maistry, 2014, p. 60).
- This view of education leads to the application of mechanistic and instrumental modes of instruction (Welch, 1998, p. 162; Maistry, 2014, p. 63) and a narrowed-down curriculum that is deemed to be more practical and hence in accordance with market demands (Welch, 1998, p. 163).
- Institutions of (higher) learning tend to measure their value (worth) in terms of their ratings in the national and international arena (Welch, 1998, p. 167).
- Neoliberalism furthermore has given impetus to the rise of economically “useful” occupations (Rustin, 2016, p. 157), and institutions of (higher) education have obliged by introducing “occupational curricula” (Rosenzweig, 1994, p. 13). This in turn has led to the neglect and even loss of many human and social science disciplines (Conradie, 2011, p. 427). This vocationalising of the curriculum in response to the economic “law” of supply and demand has led to a narrowing-down of the curriculum (Welch, 1998, p. 157). It has led, among others, to an overemphasis of Mathematics and Science at the expense of the “softer sciences” (the humanities) that quality of life and democracy depend on (Maistry, 2014, p. 68).
- Neoliberalism in our institutions of (higher) learning has meant greater emphasis on efficiency and effectiveness in line with corporate interests (Conradie, 2011, p. 427) and with higher production values (Rustin, 2016, p. 158). In the process, managers pay the human beings involved what they are deemed worth in terms of their productivity (Palley, 2004), which is in accordance with the cost-benefit factor (Adams, 2006, p. 8) and the supply and demand “law” (Welch, 1998, p. 157). All of this leads to emphasis on performativity and to an audit culture, in many cases based on inaccurate and inappropriate quantitative performance and productivity indicators (Welch, 1998, p. 160; Ball, 2003, p. 216, p. 219; Sparkes, 2007, p. 532, p. 541). Productivity is for instance measured in terms of the number of applications, student registrations and passes (input over throughput) and income generated (Conradie, 2011, p. 425).
- Many states’ policies regarding education have created openings for the play of market forces in (higher) education, in the process creating conditions for

corporate managerialism (Conradie, 2011, p. 426; Jansen, 2009, p. 144 ff.; Rustin, 2016, p. 157; Adams, 2006, pp. 7-8; Sparkes, 2007, p. 528).

- Important for us in this room, neoliberalism sees education as an investment (Tan, 2014, p. 412, p. 437). The state and institutions of (higher) learning view students as investing in their own futures (Rustin, 2016, p. 155, p. 158). This inevitably leads to a narrowing-down of the purpose of education: education is seen as essentially to provide the workforce needed by the economy (Rustin, 2016, p. 148).

All of these conditions and challenges have been brought about by the phenomenon referred to in literature as neoliberalism. An examination of the literature on the subject reveals that it is notoriously difficult to define neoliberalism and its central tenets. What is clear, however, is that it is a mental (and affective, cf. Anderson, 2016, p. 743) attitude in terms of which all walks of life are assumed to conform to the laws of economics and business, even those normally supposedly falling outside of the ambit of economics, trade, industry and business, as Foucault (2008, p. 132) has argued. Neoliberalism could be described as a worldwide drive to be more effective, efficient and productive in whatever is undertaken, even to the extent that non-commercial activities such as education are being subjected to norms normally associated with business corporations.

Before I go on to a critical discussion of these phenomena, I must point out that I have, for purposes of this paper, concentrated on those aspects of neoliberalism that seem to affect us directly as educators and academics. I have therefore not attempted to derive at a precise definition of neoliberalism, which as Anderson (2015, p. 735) correctly remarked, is a very complex phenomenon. It is not a singular, coherent entity (ideology / ideological viewpoint / discourse – Anderson, 2015, p. 737) with a simple origin point. Neither have I touched on matters such as globalisation and internationalisation, important as they might be. The mere fact that we are all gathered in this room attests to the effects of globalisation and internationalisation. Many of us have become world citizens and travelers, and users of the technology that helps us transcend all knowledge and other boundaries. We have all been subjected to international rates of exchange, international competition, and to the dangers of political and technological terrorism (fake news, click bait and so on), mass migration, water and food shortages, and even to the threat of weapons of mass destruction, earth warming, and the depletion of species, oil and gas. We leave these manifestations of a neoliberal view of life by the wayside and concentrate on those that affect us directly as educators and educationists.

Facing the challenges of neoliberalism in educational context

Each of the neoliberal perspectives enumerated above embodies a challenge to us as educationists and educators. How should we respond to each of them and all of them as a combined challenge? As far as I can see now, there are three ways of doing so. The first, which I will demonstrate in the rest of this paper, is to criticize some of the basic tenets of neoliberalism and its approach to education based on our professional insight into what human beings, society and education actually are and should be. I will follow the second approach in my paper tomorrow, where I shall discuss how and to what extent there has been a worldwide backlash against neoliberalism and its approach to education, a development that has assumed such

proportions that some observers have referred to it as a “movement”. I shall argue that this “movement” is not based on any specific life-view or philosophical principles regarding being human, our societal relationships or education but rather on dissatisfaction and disillusionment with the current neoliberal orientation to life in general, including with our social institutions and education. I intend presenting a more principled (and more philosophical) response to neoliberalism at the *Education and New Developments* Conference in Lisbon, Portugal next week (cf. Van der Walt, 2017).

The following are a number of objections to the neoliberal orientation to life, our social institutions and education, based on our professional insight into the essence of being human, the roles of our institutions of (higher) learning and of education.

A first objection to the neoliberal orientation, and in this I agree with Conradie (2011, p. 425), is that its portrayal of our institutions of (higher) learning is reductionist. It subjects all of life, and particularly education to the norms of economics, commerce, industry and trade, and tends to regard institutions of learning as business corporations which have to operate in line with business norms, and hence have to be managed as such. Neoliberalism, as Foucault (2008, p. 132, p. 145, pp. 243-244, p. 268) has observed, is an encroachment onto previously non-economic and non-business domains such as education to create market conditions and a regulation of society by the market.

Second, the utilitarianism, the monetarist economic thought (Anderson, 2015, p. 734) and commercialisation of societal relationships or collectives that are all so characteristic of neoliberalism prevent us from appreciating the true value of education (Fevre, 1997, abstract). Our society has to value education for its own sake, and not because of what we can attain from it in terms of qualifications or credentials as a tradeable commodity. We have to return to a view of education as formative rather than as functionalist, technicist, mechanistic and instrumentalist; learners should be educated in the true sense of the word; they should be formed rather than drilled (Welch, 1998, p. 161, p. 170). It must be understood that learning and scholarship possess intrinsic value in themselves but at the same time can be a contributor to our national economies. We have to appreciate the essence of education, for its own sake but also for the sake of our lives in general, including for our economy, trade and industry (Rustin, 2016, pp. 165-166).

In the process, as Rustin (2016, p. 160, pp. 165-166) has reminded us, we have in the third place to rekindle our appreciation of a more humanistic (even classical) approach to education. In essence, education has to do with the growth and formation of body and mind and of spiritual values (Welch, 1998, p. 169). A proper education creates spaces for freedom of mind in the form of creative thinking (Maistry, 2014, p. 69).

In the fourth place, while we understand that the economy, trade and finance play an important role in our personal and institutional lives (Welch, 1998, p. 158) and that economics and education are intrinsically connected (Maistry, 2014, p. 60), we have to keep in mind that economics, trade, finance and industry all form but one facet of human existence (Diedericks, 2016, p. 5). I agree with Brown (in Shenk, 2015) when she insists that we have to resist the domination of our lives by capital, as well as the commercialisation of things that should be protected against market

forces such as education, scholarship, teaching and learning. We should not subject education to economic and political interests that have very little to do with the intrinsic value of education. We have to be wary of the commodification of teaching and learning and of knowledge (Welch, 1998, p. 160). Education should not be reduced to an 'auditable commodity' (Ball, 2003, p. 225). Our lives should not be dictated or shaped by market conduct (Brown in Shenk, 2015). To allow it to be determined by these forces would lead to the impoverishment of education (Welch, 1998, p. 165), in other words, to a reductionist view of education.

In the fifth place we should promote an egalitarian sharing of our public goods (such as university education). Education is not only for the wealthy and the politically powerful.

Sixth, we have to restore the status of the human being from that of *homo oeconomicus*, in other words from a view of the human being as "financialised human and social capital", to a view that people are complete human beings educated and called to conduct a full and meaningful life. Our status, also as educationists and educators, should be restored from that of market creatures and value-enhancing human capital to that of responsible and accountable persons functioning in civic, familial, political, religious and ethical life. The time has come, according to Maistry (2014, p. 70), to re-centre the human subject and to engage in alternative (i.e. anti- or non-neoliberal) discourses on the purpose of education.

Seventh, efficiency and effectiveness are indeed important to us as educators and educationists. However, as Welch (1998, p. 157) has rightly argued, efficiency should be humane and honourable, characterised by felicity, loyalty, participation and right conduct (ethical). We have to guard against a tendency to promote efficiency by discounting the less quantifiable aspects of education or assigning (arbitrary) economic values to them (Welch, 1998, p. 158). We should not employ questionable and arbitrary quantitative measures to determine our value and efficiency as university staff or those of our students (Sparkes, 2007, p. 541).

In the eighth place, we have to resist managerialist tendencies in institutions of (higher) learning. As academics, we have to reclaim our autonomy as professionals, as academic departments, schools, faculties and institutions and take charge of our own work as tutors, mentors and researchers. Put differently, we have to take charge of the core functions of our work as academics (Jansen, 2009, p. 145). Institutions of (higher) learning in general also should be able to organise their own affairs without interference from either the state or business (Adams, 2006, p. 4).

In the ninth place, we have to resist the commercialisation, vocationalisation and narrowing of the curriculum by imposing business-style principles on it. We also have to resist the economisation of the curriculum due to subjecting it to the law of supply and demand (Welch, 1998, p. 157). In this process, we have to guard against the introduction of functional and utilitarian disciplines at the expense of the "softer sciences", the humanities. A democracy also needs the humanities to function well (Maistry, 2014, pp. 67-68). I agree with Conradie (2011, p. 430) when he claims that when we carry the tenets of neoliberalism to the extreme, it would undermine the quality of our lives as educators and also those of our students.

Finally, we have to keep in mind that neoliberalism is a stealthy influence that has slowly but surely colonised our minds and habitus. It has become for many people, as Anderson (2015, p. 738) recently concluded, a form of common sense

that “feels coherent” and therefore intuitive. We have to be aware of this and resist its influence wherever possible but especially in the pedagogical sphere. It is not merely that performativity tends to get in the way of our “real academic work”; it has already changed who and what we are, our humanity. It leaves very little space for our academic autonomous individual or collective ethical self to function (Ball, 2003, p. 226).

Conclusion

In this paper, I focused on the challenges that have in recent years emerged from a business and commercialized view of the human being, institutions of learning and education. This orientation to life in general and education in particular has so colonised our minds that many of us are hardly aware of its influence on how we approach education. In recent years, however, there has been a three-fold backlash: (a) many critics of neoliberalism has recently become quite vocal in their criticism of neoliberalism based on their professional understanding of the essences and roles of the human being, societal relationships and education; (b) others have spontaneously begun a worldwide resistance movement against neoliberalism in general and its impact on education in particular (cf. my paper tomorrow); and (c) still others offer criticism based on specific life-view and/or philosophical principles (cf. Van der Walt, 2017).

* * *

I conclude by thanking the organising committee of the Annual International Conference of the *Bulgarian Comparative Education Society* for inviting me to prepare and give this address. I sincerely hope that it will give impetus to our discussions during the Conference.

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Prof. Dr. Johannes L (Hannes) van der Walt, Edu-HRight Research Unit, Potchefstroom Campus, North-West University, South Africa, hannesv290@gmail.com

Part 1

Comparative Education & History of Education

Charl Wolhuter

Economics and Comparative and International Education: Past, Present, Future

Abstract

The aim of this paper is to map this place of economics in the field of study of Comparative and International Education. Interrelationship between economy and education is concerned, two broad lines of enquiry lie within the scope of Comparative and International Education: economy as shaping force of education systems and the effect of education on the economy. In the interwar “factors and forces” stage of Comparative Education, the economy as a shaping force of national education systems came to the fore. In the social science phase of the 1960s the focus shifted to a study of the effect of education on the economy. This was reversed again in the 1970s, when socio-economic reproduction theories assigned a deterministic place to socio-economic stratification of society. In recent years neo-liberal economics dictated the research agenda of Comparative Education. In conclusion recommendations for a future research agenda in the field are made.

Keywords: Comparative and International Education, human capital theory, knowledge economy, neo-liberal economics, socio-economic reproduction

Introduction

The saying “money makes the world go around” is even more true than ever in an age of neo-liberal economics in a globalized world. Therefore scholars of the field of Comparative and International Education should also be mindful of the place of economics within this field of scholarly endeavor. The aim of this paper is to map this place of economics in the field of study of Comparative and International Education. The paper commences with the clarification of the concept of Comparative and International Education and from there identify the two major lines of investigation of economics as these are the concern of comparativists. Then the study of economics in the various phases in the historical evolution of Comparative and International Education is surveyed and assessed. In conclusion, guidelines for the future unfolding of these lines of investigation in the field are made.

Economics and Comparative and International Education: Scope

Comparative and International Education can be defined as a three in one perspective on education, namely:

- An education system perspective
- A contextual perspective
- A comparative perspective (Wolhuter, 2015, pp. 24-26).

Firstly then Comparative Education focuses on the education *system*. The focus of Comparative Education is broader than just the education system *per se*. The education system is studied within its societal context, and is regarded as being shaped by, or as being the outcome of societal forces (geographic, demographic, social, economic, cultural, political and religious) and also, in turn as education shaping society. Finally, Comparative Education does not contend with studying one education system in its societal context in isolation. Various education systems, shaped by their societal contexts, are compared; hence the comparative perspective.

In view of trends in both the worlds of scholarship and in education, there is in recent times a belief that the name of the field should change to Comparative and International Education. The term International Education has a long history and has taken on many meanings. However, here International Education is used as referring 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.

From the above it can be deduced that as far the interrelationship between economy and education is concerned, two broad lines of enquiry lie within the scope of Comparative and International Education:

- Economy as shaping force of education systems
- The effect of education on the economy.

The interwar “factors and forces” stage of Comparative and International Education

During the very early phases in the historical evolution of Comparative Education, that of travellers’ tales (since time immemorial), the systematic study of foreign education for borrowing (since the beginning of the nineteenth century) and the phase of international cooperation (since 1925) education-economics interrelations escaped the attention of comparativists (*cf.* Wolhuter, 2017). During the ensuing “factors and forces” phase – which reach its zenith in the decades between the two world wars – (national) education systems came to be seen as the outcome of societal forces (geography, demography, social system, economy, politics and religious and life and world view) and eminent scholars in the field at the time, such as Isaac Kandel, Nicholas Hans, Friedrich Schneider, and later Vernon Mallinson, Arthur Moehlman, Phil Idenburg and others, all designed elaborated schemes enumerating and ordering these set of contextual forces. Scholars in the field thus turned to the economy as a shaping force of (national) education systems. Aspects of the economy that were regarded as having an impact on education include:

- The level of economic development, and
- The structure of economic activities.

The level of economic development in a country, or the degree of affluence of a community, determines the amount of funding for schools, for teachers, and for other educational facilities and expenditures.

The proportion of a country's workforce engaged in various economic activities (primary activities such as agriculture, forestry, fisheries and mining, secondary economic activities, i.e. manufacturing and the tertiary or service sector) will have a bearing on the education system, particularly in so far as an education system prepares learners for their future careers.

The 1960s: Social science phase of Comparative and International Education

The 1960s saw a strong movement of turning Comparative Education into a fully-fledged social science, and a positivistic social science at that. During this time there was a euphoric belief in the societal ameliorative power of education: education came to be seen as a wonder cure for every societal ill. For example, if a societal ill such as drug abuse was identified, the obvious solution was believed to supply "anti-drug education". Concerning the interrelationship between economics and education the direction of investigation reversed from what it was in the "factors and forces" era. Now the effect of education on the economy became the focus of attention, e.g. the effect of education on economic growth or the effect of education on the eradication of unemployment. Human Capital Theory came in the vogue. Theodore Schultz's Theory of Human Capital portrayed education as a factor in the production factor, upon a par with – in fact carrying bigger weight than – other production factors such as (monetary) capital, machinery, land and labour.

Two major lines of investigation were firstly macro-level studies, calculating correlations between development of national education systems and level of economic affluence of nations. The proto-type of these studies was surely that of Harbison and Myers (1964). The second line was rates of return analysis on investment in education (*cf.* Lozano, 2011).

The 1970s: Pessimism and heterodoxy

The education expansion drive which gained, in all seriousness momentum since the 1960s did not produce the predicted societal benefits. For example, instead of eradicating unemployment, the spectre of schooled unemployment raised its head, especially after the worldwide economic slowdown which set in after the first oil crisis in 1973. The 1970s was a decade of increasing pessimism amongst comparativists, as to the societal dividends of education. Rival paradigms to modernisation theory and structural-functionalism set in, particularly reproduction theories.

Theories of socio-economic reproduction, of which Bowles and Gintis' (1976) publication is widely regarded as the trailblazer, view education as serving to reinforce socio-economic stratifications. Children of upper and middle class families attend well-endowed schools offering high quality education, equipping these children for well-paid and prestigious careers. On the other hand schools attended by children from poor families are less well-endowed and offer a poor quality education, thus dooming these children towards entrance to low held jobs. World

system analysis (*cf.* Arnove, 1982) projected this thesis on a world-wide canvass: dominance of Northern Hemispheric education models and epistemological paradigms keeps the Global South subdued and in a state of perpetual underdevelopment.

Hence the direction of investigation reversed once again one hundred and eighty degrees: no longer the effect of education on the economy was the focus of interest, but the effect of economic forces (economic inequality in particular) on education.

The 1990s: Heterogeneity. A more nuanced view

By the early 1990s protagonists of various paradigms no longer spent all their energy criticising each other, but, in the time spirit of Postmodernism, a tolerance, even an appreciation of different paradigms developed in Comparative Education (Rust, 1996, p. 32). Postmodernism rejects the notion of one perspective/paradigm containing the entire truth, but advocates an awareness and acknowledgement of a multiplicity of knowledge perspectives. This phase also saw a proliferation of the number of paradigms emerging in Comparative Education.

The oscillating deterministic frameworks of the previous two phases made way for more nuanced views on the interrelationships between education and society (*cf.* Stromqvist, 2005). Education was no longer seen as a wonder cure to all societal ills nor as being held captive by power relations in society. For example, Gladwell (2013, pp. 63-96) recently demonstrated statistically that poor schooling is no absolute determinant of academic achievement of students.

The current age of globalization and the neo-liberal economic revolution

Two forceful contemporary societal trends impacting on the interrelationship between education and economics; and the scholarly study thereof, are that of globalization and the neo-liberal economic revolution. Halls (1991, as cited by Pang, 2013, p. 18) defines globalization as "... the intensification of worldwide social relations which link distant localities in such a way that local happenings are shaped by events occurring many miles away and vice versa". The neo-liberal economic revolution entails the retraction of the role of the state in the economy and even in the provision of social services; and giving the forces of the market and private entrepreneurship freedom of reigns (*cf.* Van der Walt & Wolhuter, 2017). This revolution commenced in the late 1970s and early 1980s in Western Europe and North America, and after 1990 spread to the erstwhile East Bloc and to the countries of the Global South.

Globalization is creating what Friedman (2009) calls a "flat world", that is where whatever benefits geography (location, endowment with natural resources) may have bestowed upon a country, have been wiped out by ease of communication and transport in the modern world, and in a "flat world" competitiveness depends on quality of human resources and economic, political and social context. In a neo-liberal economy, the value of the human being is (however objectionable) reduced to a production and consumption unit, hence once again, the value of education is narrowly judged in terms of its contribution towards raising economic productivity of the educand. This revolution also carried the principles of efficiency and the

profit motive into education, and it gave rise to the rise of private education, all these with obvious implications for the Comparative Education research agenda.

The rise of the knowledge economy

A final salient contemporary trend is that of the nascent knowledge economy. In the histories of (national) economies, the following phases are distinguished. In most primitive ages or economies, a phase of hunting and gathering existed, hunting and gathering were the only economic activities. After the Agricultural Revolution, which began in the “Fertile Crescent” of the Middle East about 10,000 to 12,000 years ago, agricultural economies arose, where agriculture and/or other extractive industries, such as mining, fishing, or forestry for trade and profit, became the mainstay of the economy. Next, after the Industrial Revolution, which began in England from about 1760, industrial economies developed, where manufacturing became the basis of economies. Next, a phase of services, where services constitute the majority of economic activities, appeared in North America and Western Europe in the twentieth century. Now, in the most advanced economies, a phase of a knowledge economy is dawning, i.e. an economy where the production and consumption of new knowledge has become the driving axis of economic development. In a knowledge economy education assumes even more value as generator of economic growth and prosperity.

Future?

While the imperatives of the knowledge economy and the reality of neo-liberal economics cannot and should not be denied, the unfettered pursuit of the profit motive, and the exclusive view of a human being as a production and a consumption unit, cannot be warranted and is a reductionist, even dangerous view of the human being (*cf.* Van der Walt & Wolhuter, 2017). In this regard a few other measures, in calculating the effect of education (rather than merely rates of return analyses) could be suggested.

Gross National Happiness is one such measure, being made up of nine domains: psychological well-being, ecological diversity, community vitality, good governance, cultural diversity and resilience, education, time use, living standards and health (*cf.* Centre for Bhutan Studies and GNH Research, 2016). Calculating intercorrelations between measures of education on the one hand, and on the other, the composite GNH value and the values of the indices of the other eight domains, may well yield interesting results.

There is also the concept of “soft power” of a country, a concept formulated by American policy specialist Joseph Nye in the 1990s. Every year the journal *Monocle* publishes a list of the 25 countries in the world with most “soft power”. The “soft power” of a country is made up of a number of factors such as how many universities in the world’s top 100 universities are in the country, the number of consulates and embassies, number of Nobel prize winners, number of asylum seekers, number of visitors to top museums, number of think tanks, number of international tourists (and the amount of money they spend), number of World Heritage Sites and number of international students (Booyens, 2016).

Then there is also Capability Theory. Capability theory is a philosophy of which the major protagonists are economist Amartya Sen and legal expert Martha Nussbaum. It is a philosophy emphasising individual emancipation in the shape of personal choice and freedom. The concept of capability in this philosophy is not the narrow understanding associated with skills such as numeracy or literacy. Capabilities are defined as the functions, opportunities and freedoms people possess to pursue goals they value and to bring about change that is meaningful to them (Steyn *et al*, 2016, p. 143).

Conclusion

While there are within the field of Comparative and International Education several themes relating to the interrelationship between education and economics; scholars in the field should guard against the narrow, reductionistic view of viewing the human being as merely a production and consumption unit. In attaching more value and in promoting a more balanced view of humans several themes could be added. Biesta (2013, p. 4) is of the view that the question “for what reason do we want an education system?” can be answered in one of three basic ways, namely to learn skills (the child or educand should learn useful skills, such as a trade), to socialise (to adapt to society and to be able to function in society) and to individualise (education should create opportunities for self-actualisation or for maximum possibilities of choices for the educand). For most people the purpose of education/schools lie in a combination of these three ideal types, with varying value attached to the relative importance of each. Comparative and International Education too can reach its maximum potential when all three are considered.

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Prof. Dr. Charl Wolhuter, North-West University, Potchefstroom Campus, South Africa,
Charl.Wolhuter@nwu.ac.za

Johannes L van der Walt

Spontaneous Responses to Neoliberalism, and their Significance for Education

Abstract

This paper is a sequel to the keynote address at the 2017 BCES Conference. The keynote address concluded with the thought that some educationists respond intuitively and spontaneously to neoliberalism and its impact on education whereas others reject neoliberalist precepts and their pedagogical implications on definite principled grounds. This paper deals with the former response; it offers pedagogical insights gleaned from an overview of intuitive, spontaneous reactions to neoliberalism.

Keywords: anti-neoliberalism, neoliberalism, education, education system, globalization, internationalism

Introduction

In my keynote address to Conference last night I concluded that there are two major categories of responses to neoliberalism and its impact on schools and universities, namely a spontaneous, intuitive reaction, and a response based on pertinent life-conceptual and / or philosophical principles (cf. Van der Walt, 2017). The first response is based on the intuitive “feeling” or perception that there must be “something radically wrong” with neoliberalism’s imposition of business and economic demands on areas of life that only have a peripheral interest in and responsibility regarding business and economy. The purpose of this paper is to outline some of these rather more intuitive and spontaneous reactions to neoliberalism as a possible important turning point in history and to gauge their impact on education.

I intend to show that various responses have risen worldwide but have not yet formed an organised or coherent “movement” against neoliberalism (Mostert, 2017). I do not go as far as Rabe (2016, p. 19) to aver that this movement is on the point of bringing about “a new world order”. Holzapfel’s (2016, p. 7) view about such responses is probably more realistic: he sees the new movement as a worldwide uprising against “Big Government” and against the capitalist elite that has so far dominated the world stage. The concomitant rise of populism is an expression of the frustrations and aspirations of the seemingly powerless “ordinary people” on the ground (Du Plessis, 2016, p. 6). In a sense, the anti-neoliberal “movement” can be regarded as a rebellion against the current dominant capitalist order (Pienaar, 2016, p. 5). Slightly more than a decade ago, Huntington (2005, p. 143) already predicted the emergence of such movements as part of the global rise of subnational identities that would be creating crises of national identity in countries throughout the world. Globalisation and internationalisation had by then already begun generating in people the need to seek identity, support and assurance in smaller groups.

The portrayal of the various spontaneous developments below will show that they form part of an anti-neoliberal groundswell. They do not yet form part of an organised social movement but are nevertheless part of a worldwide response to neoliberalism and how it has impacted on the lives of “ordinary citizens” all over the world and on their education. The various developments are so wide-ranging and so inherently different from one another that it requires some ingenuity to subsume them all under one heading.

Background

Although it is not yet clear how the various responses to neoliberalism and its impact on education came into existence, there are indications that they tend to make use of particular techniques. One of these is to spread “post-truths” and “fake news” (Froneman, 2017, p. 12). The “truth” and the “news” may range from satire to propaganda, and may intend to mislead. Some anti-neoliberals create “echo chambers” by exchanging snippets of unverified facts and news, and allowing such “news” to morph into “viral facts”. Technology helps in this process, among others in the form of “clickbait” on the internet. Terms that have been widely used recently are “alt-right” (referring to a rejection of mainstream politics) and “woke” (meaning that one is wide awake to injustices in a particular society).

The current “political cacophony”, the advent of which was predicted by scholars such as Huntington (2005, p. 138, p. 143, p. 261), Berlant (2011, p. 11), Anderson (2015, p. 747) and others, is further stimulated by the use of the social media and the systematic use of websites in which false information is spread among increasing numbers of people. Political propagandists purposely write fiction and present it as fact (Bezuidenhout, 2016, p. 17). By making use of techniques such as these, the propagandists succeed in bringing about widespread hostility to the political, mainstream media and business establishments that have so far guided people’s thinking. Trust in institutions is thereby being brought to an all-time low and a belief is instilled in “ordinary people” that their country and its system are headed in the wrong direction. With the aid of techniques such as all these, the propagandists instill a potent anti-establishment spirit: they portray the elitist leaders as the representatives of an oppressive status quo and as out of touch with the “man in the street” (Gaughan, 2016). Their message is clear: the elitist approach to politics is out of touch with the interests of the ordinary (middle and lower class) people on the ground (Viljoen, 2016, p. 21).

The rise of populism has created a ready-made outlet for the spread of propaganda with the aid of such mechanisms (Rabe, 2016, p. 19). It helps when “ordinary people” become cynical about whether the “facts” shared with them are credible, true and factual or not. They readily accept the “post-truths” offered to them because the objective facts mean less to them than claims rooted in emotion and personal belief.

Some of the recent anti-neoliberal developments all over the world

There are signs of growing populism all over the world. The opposition to capitalist elites has given impetus to populist political views (Reuters, 2017, p. 11), as can be observed in for instance Britain’s Brexit from the European Union,

Trump's election as US President and a variety of other incidents. Donald Trump's unexpected election occurred shortly after the unexpectedness of the Brexit referendum result on 23 June 2016 (Viljoen, 2016, p. 21). In some respects, Brexit embodies the "ordinary people" in Britain's dissatisfaction with the status quo, among others the fact that their own fate as Britons is being determined in Brussels.

In January 2017, Oxfam brought to the attention of the World Economic Forum's (WEF) gathering in Davos, Switzerland, the fact that large inequalities existed in the world. Oxfam mentioned that in 2016 only eight people possessed more wealth than the poorest half of the world population (around 3.6 billion people). According to Oxfam, the wealth of the super-rich has increased at a rate of 11% per annum whereas the wages of many workers have stagnated. Inequality has increasingly come under the spotlight with among others the head of the International Monetary Fund (IMF) and the Pope speaking out against the deleterious effect of this unequal spread of wealth and resources (Reuters, 2017, p. 11). There are indications that the WEF is taking utterances by new US President Trump seriously: it has decided to hold a special summit later in 2017 in Washington to discuss some of the issues raised by Trump during his election campaign (Bloomberg, 2017, p. 12).

These are interesting developments in view of Harvard Professor and former chief economist of the International Monetary Fund Kenneth Rogoff's conclusion that the conventional wisdom of the WEF capitalist elite gathered at Davos annually so far always "had it wrong" in that its consensus about globalisation, free markets, the free movement of products and resources has not been in the interest of the "ordinary people" on the ground, i.e. those without education or money. Very little has been done since the 2008 recession to improve the lives of the middle and lower classes.

What we are now seeing in the world is a reaction to this neglect. The capitalist elite are beginning to understand that they will have to change their approach if they intend creating wealth for all (Bloomberg, 2017b, p. 12). It is in view of this that International Monetary Fund Executive Director Christine Lagarde stated that globalisation has to get "a new face" so that fewer people will feel excluded. Having said this, however, she hoped that there would be no more moves towards "deglobalisation". She also expressed concern about Trump's policy of protectionism, the economic effects of Brexit and the growing right-wing sentiment in Europe. She feared that political tensions about globalisation and trade would lead to slow or negative economic growth (Bloomberg, 2016, p. 13).

Donald Trump became United States of America President on 20 January 2017. At the time of writing this paper, there was not much clarity about how his opposition to globalisation and internationalism would play out during his term. There are indications that his administration would be more protectionist in view of his speeches about economic nationalism, the building of walls, the tearing up of international trade agreements, "America first" (Bloomberg, 2017, p. 12), mercantilism, free trade only to the advantage of America, relationships that would bring financial gain to America, and relationships with leaders that could be advantageous for America (Schreiber, 2016, p. 9). Trump clearly read the sentiments of "ordinary Americans" accurately: their resistance to the status quo, their distrust of the capitalist elite in Washington, and the general neglect of the interests of the

working class (Viljoen, 2016, p. 21). He heard them saying that they felt betrayed by globalisation and the uncontrolled influx of immigrants (Holzapfel, 2016, p. 7).

In 2005, Huntington (2005, p. 138) had already detected signs of such a future anti-neoliberal groundswell. The erosion of national identity in the later decades of the twentieth century had four principle manifestations: the popularity of the doctrines of multiculturalism and diversity among some elite elements; special interests that elevated racial, ethnic, gender, and other subnational identities over national identity; the weakness or absence of the factors that previously promoted immigrant assimilation combined with the increased tendency of immigrants to maintain dual identities, loyalties and citizenships; the dominance among immigrants of speakers, largely Mexican, of a single non-English language; and the denationalisation of important segments of America's elites. Trump took the gap that began opening between the government elite's cosmopolitan and transnational (i.e. neoliberal) commitments and the still highly nationalist and patriotic values of the "ordinary American public".

Trump followed up on the views of among others Joe Stiglitz, one of the most influential economists of our time, who is known for his critical view of the management of globalisation and of the "free market fundamentalists" (neoliberals), the IMF and the World Bank. Stiglitz is convinced that unfettered markets often do not lead to social justice and also not always to efficient outcomes. Market fundamentalism nevertheless continues to exert enormous influence, among others by creating great inequalities (Stiglitz, 2013).

Bezuidenhout (2016, p. 17), in his discussion of post-truth, "alt-right" and "woke", mentions the possibility that dissatisfied individuals and groups in the Middle East and North Africa also availed themselves of the social media and the systematic use of websites to spread rumours and false news among the "ordinary people". This might have contributed to the Arab Spring in 2011.

In India, according to Roy (2014, pp. 95-96), the "ordinary people" have also "had enough" of the perpetrations of the capitalist elite. The "Occupy Movement" has joined thousands of other resistance movements all over the world "in which the poorest of people are standing up and stopping the rich corporations in their tracks". The struggle has awakened their imagination: they begin to see that capitalism "has reduced the idea of justice to mean just 'human rights' and the idea of dreaming of equality has become blasphemous". Roy goes on to say: "We are not fighting to tinker with reforming a system that needs to be replaced".

I would finally like to draw attention to the situation in South Africa. Cele and Koen (2003, §35), after examining student politics in the period 1960 to 1990, came to the conclusion that student organisations had changed from protest oriented structures to structures focusing on economic rather than political issues. Students were inclined to protest against current social, political and economic conditions. Based on their studies, they predicted that "this could lead to mass protests as many student leaders (in 2003 already) express(ed) open dissatisfaction with the limited role they play(ed) in addressing political, as opposed to economic concerns". In Cloete's (2016) opinion, the student activism in 2015-2016 should not be ascribed only to conditions on university campuses; it is part of a wider groundswell among the "ordinary citizenry" of the country. Universities are merely useful platforms on which to express general dissatisfaction with the status quo. Whereas the student

disobedience originally found expression within the neoliberal frame of mind, it has in recent years changed to a movement outside of the neoliberal agenda. Students have begun to realise that they would never enjoy free higher education and that they will therefore remain locked in an “endless system of debt” and of “financial exclusion”. The students have begun to realise that their situation has deteriorated under the neoliberal policies that the current Government has adopted. According to Naidoo (2009, p. 167), “the spirit of disobedience, refusal and rebellion embodied in the struggles of the youth against apartheid no longer finds resonance within the (neoliberal) movement”.

South Africa’s (and Burundi’s) intended withdrawal from the Rome Statute and thereby from the International Criminal Court can also be construed as a step towards a rejection of globalisation and internationalisation, two pillars of neoliberalism (cf. Huntington, 2005, p. 271).

Discussion

It would be fair to conclude that all the movements mentioned in this paper could be just a number of unconnected incidents. One could also argue, on the other hand, that they are all part of a worldwide social movement, though as yet uncoordinated and disparate. A golden thread seems to run through all of them, namely an aversion to the precepts of neoliberalism. This conclusion raises the question: *What could be the significance of the rise of such social movements for education worldwide?* The following are a few thoughts in this regard.

Firstly, education should be tailored according to the pedagogical and career needs of all people, including those in the middle and working classes. The interests of the “ordinary people on the ground” should be taken into account. Education systems should be planned in such a manner that they can embrace the interests and career preparation of all citizens, not only those of the wealthy and governing elite.

Secondly, education systems should adopt a value system that is in line with the first point. Instead of supporting and advancing capitalist and neoliberal values, education systems should be tailored to promote values that would be advantageous to all the people within a country, including the inculcation of a sense of justice and equality. Schools and education systems should not be managed like business corporations but as institutions of teaching and learning.

Thirdly, a new approach to citizenship education should be adopted. Instead of focusing on internationalism and globalism, educators could consider inculcating values pertaining to national identity, appreciation of what is typical of their own country and culture, and concentrate on helping immigrants to adopt the new national identity.

Finally, educators should guard against the proliferation of post-truth and fake news. Classrooms should never deteriorate into echo-chambers for spreading falsehoods and half-truths. Educators should guide learners to be prudent users of the internet and the social media.

Conclusion

The contents of this paper are tentative and provisional; the responses to the neoliberalist orientation to education outlined have not yet run their course. Final

conclusions about the various social movements cannot be drawn as yet, but one thing seems clear: they all seem to be responses to the current domination of the neoliberal value orientation (in education). The contents of this paper embody a wakeup call to all involved in education: educators and educationists will soon be called upon to take a stance regarding the challenges flowing from an anti-neoliberalist orientation, particularly regarding education.

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Prof. Dr. Johannes L (Hannes) van der Walt, Edu-HRight Research Unit, Potchefstroom Campus, North-West University, South Africa, hannesv290@gmail.com

Harold D. Herman

Affirmative Action in Education and Black Economic Empowerment in the Workplace in South Africa since 1994: Policies, Strengths and Limitations

Abstract

This paper explains the concepts of Affirmative Action (AA) and Black Economic Empowerment (BEE) and the policies developed in post-Apartheid South Africa. It compares it to similar policies adopted in different contexts in Malaysia, India and the U.S.A. It explains and critiques the South African policies on AA and BEE, its history since 1994 and how class has replaced race as the determinant of who succeeds in education and the workplace. It analyses why these policies were essential to address the massive racial divide in education and the workplace at the arrival of democracy in 1994, but also why it has been controversial and racially divisive. The strengths and limitations of these policies are juxtaposed, the way it has benefitted the black and white elites, bolstered the black middle-class but has had little success in addressing the education and job futures of poor, working class black citizens in South Africa. The views of a number of key social analysts in the field are stated to explain the moral, racial, divisive aspects of AA in relation to the international experience and how South Africa is grappling with limited success to bridge the divide between the rich and poor.

Keywords: Affirmative Action, Black Economic Empowerment, South African policies, racial inequity, international experience, race, class, poverty, education and workplace, positive discrimination, reverse discrimination

Introduction

Positive discrimination, affirmative action and measures of redress have been applied in favour of minorities in a number of countries throughout history. These policies and practices have variously been called reverse discrimination, preferential treatment, or affirmative action. Most analysts agree that the modern concept of affirmative action was formulated during the Civil Rights Campaign in the United States during the 1950s and 1960s. The U.S. President John F. Kennedy is credited with coining the term “affirmative action” in 1961 (Potts, 2000) in an Executive Order following the creation of the Committee on Equal Employment Opportunity. Affirmative Action (AA) has been developed in the 1960s as a tool to help achieve a semblance of equity within an increasingly diverse U.S. population. It began as an effort to incorporate race and economic disadvantage in the process of decision-making in the workplace and in the admissions to public universities and colleges (Douglas, 1999).

In an earlier paper entitled “A comparative analysis of Affirmative Action in South Africa, India, Malaysia and the U.S.A.” at the XIIIth World Congress of Comparative Education Societies in Sarajevo, Bosnia in 2007, the author discusses how these policies were applied in the four countries. This paper analyses the

progress and challenges of AA and Black Empowerment policies as they have been applied since South Africa became a democracy in 1994.

AA in South Africa since the dawn of democracy in 1994

In 1992 Mandela said that what has often been interpreted as positive discrimination in favour of Whites has actually been confirmed to be blatant White racism (Potts, 2000). Many feel that affirmative action requires a group who has been negatively and unfairly discriminated against due to personal characteristics such as race/ethnicity that is granted positive measures to erode the legacy of this discrimination. In her book "Beyond Affirmative Action", Adèle Thomas (1996) says that in a broad context, affirmative action has been seen in South Africa as a means of correcting historical injustices and as an attempt to work from there to eventually create level playing fields where everyone can compete, based upon equal access to education, training and other opportunities formerly restricted to the White minority population. The motivation for instituting programmes of affirmative action generally lies in moral, legal or social responsibility issues. However, some scholars feel that affirmative action should have a time-span in countries like South Africa where you are affirming majorities, and should end if it is indeed successful, within one generation (20 years) or more since the country became a democracy in 1994. In South Africa affirmative action claims are being made across a spectrum of fields, restitution being sought with regard to land, housing, education and health, in addition to employment. Clive Thompson seeks a different banner for the concept affirmative action in the South African workplace, viz. employment equity. He finds the term employment equity preferable, given the historical and foreign baggage of the term affirmative action, there being close antecedence in domestic labour relations vocabulary, employment equity being positive in its import, the unfair labour practice concept having been presented in the developing jurisprudence as being coterminous with the notion of equity, and denoting the particular subject under scrutiny-employment and labour relations (in Adams, 1993, p. 27).

After a long liberation struggle, South Africa became a democracy in 1994 with the first democratic elections which led to Nelson Mandela becoming the first black President of the country. The AA policies before 1994 are now history, the question was how to address the huge backlogs of the majority black population in an equitable, just post-Apartheid era in line with one of the most democratic and progressive constitutions which South Africa adopted in 1996. The Constitution (1996) was operational since February 1997 supported by a new Bill of Rights. It became the supreme law in the country and its preamble states that it aims "to establish a society based on democratic values, social justice and fundamental rights" in terms of which "every citizen is equally protected by the law". In addition Section 1 of the Constitution lists the "achievement of equality" as one of South Africa's fundamental values and within the Bill of Rights equality is stated as the first substantive right. Section 9.2 of the Constitution states that "to promote the achievement of equality, legislative and other measures designed to protect or advance persons, or categories of persons, disadvantaged by unfair discrimination, may be taken". So, unlike the constitution of liberal democracies like that of the

U.S.A., the South African constitution speaks directly to mechanisms to address inequalities in the society.

In 1998 a law was passed which became the central pillar of the AA policies, the Employment Equity Act, No. 55 of 1998 (EEA). The purpose of the Act is to achieve equity in the workplace. The Chapter on the prohibition of unfair discrimination states that no person may unfairly discriminate, directly or indirectly, against an employee in any employment policy or practice, on one or more grounds including race, gender, pregnancy, marital status, family responsibility, ethnic or social origin, colour, sexual orientation, age, disability, religion, HIV status, conscience, belief, political opinion, culture, language and birth. It also says that it is not unfair discrimination to promote affirmative action consistent with the Act or to prefer or exclude any person on the basis of an inherent job requirement. When unfair discrimination is alleged, the onus of proving that the discrimination is fair is on the employer.

The AA measures of the Employment Equity Act are intended to ensure that suitably qualified employees from designated groups (Africans, Coloureds and Indians/Asians), promote diversity, reasonable accommodation for people of designated groups and their development and training. There needs to be numerical goals and preferential treatment for these designated groups, but the allocation of quotas is excluded.

To monitor the progress of EE, the Act requires all employers to prepare and implement an Employment Equity Plan stating its objective for each year, its AA measures, numerical goals for equitable representation, a time table for each year, internal monitoring and evaluation procedures and the identification of persons such as senior managers to implement the plan. The Department of Labour and if necessary, the Labour Courts, will monitor the annual progress of business in the implementation of their AA Plans.

The urgency of racial transformation within business has led to the concept of Black Economic Empowerment (BEE). There has been increasing transfer of shares in companies and positions on boards of directors of companies to blacks, not the least ANC luminaries who have become multi-millionaires as BEE took off. This has led to intense debate about the pros and cons of BEE, whether it is indeed addressing the inequalities of the society or whether it is window-dressing by the White-dominated economy. The concept has been expanded to be called Broad-based Black Economic Empowerment (BBBEE) as it became clear that as a corrective measure, it was privileging the black elite and not reaching out to the poor of the country. In fact, it is now a common perception that BEE is only benefitting the elite and politically well-connected individuals and that the gap between the rich and the poor in South Africa is now even larger. The burgeoning black middle-class is now referred to as "Black Diamonds" and the debate on the need for the upliftment of the poor has intensified.

Before 2008 serious measures were developed to improve Black Economic Empowerment (BEE) and address some of the weaknesses mentioned above. These include business sectoral charters for BEE negotiated between business, labour and government. Also the institution of BEE Generic Scorecards to verify the BEE credentials of businesses. These scorecards contain various elements such as ownership, management control, employment equity, skills development, enterprise

development, socio-economic development and sector specific contributions. BBEE ratings were developed on the basis of these elements to verify the appropriate BEE credentials.

In 2007, the Department of Trade and Industry (D.T.I.) gazette the Black Economic Empowerment (BEE) Codes of Good Practice to try and remedy the limitations listed above. In terms of these Codes a number of Transformation Sector Charters were introduced, vetted and analyzed for compliance as per the stipulations of Section 9 and 12 of the Broad-based Black Economic Empowerment (BBBEE) Act, No 53 of 2003. The responsibility of the D.T.I. is to ensure that the various Sector Charters submitted for gazetting are sufficiently aligned to the BBBEE Act and Codes of Good Practice and advance the objectives of sustainable BBBEE (Dept. of Trade and Industry, 2016).

These Sector Charters were effective from dates varying from 2009 to 2016. Each one had set targets relating to black empowerment. The coming years will show to what extent these targets are met to achieve Broad-Based Black Economic Empowerment.

This paper, however, focuses primarily on AA as it is applied in the Education Sector. In a paper presented just before the first democratic elections in 1994, Claassen (1993) discusses the possibilities of AA aimed at firstly equality of educational opportunity and secondly, at achieving equality of results. He posits that to achieve equality of opportunity there has to be parity of educational expenditure within the education departments, compulsory education for all racial groups, a unified education system, academic support programmes in areas such as medium of instruction (additional tuition for non-English speakers if the medium of instruction is English), financial support for students from disadvantaged backgrounds for tuition fees, accommodation, transport, books and school feeding schemes, curriculum restructuring and in-service training programmes for under-qualified teachers. He distinguishes AA programmes aimed at achieving equality of results as reserved for managerial, administrative, teaching positions for persons from disadvantaged groups, enrolment quotas for preferred students, enforced school integration and enforced multicultural school staff composition.

Most of these policies have been adopted and implemented in some form in South Africa over the past decades. The National Department of Education (DOE) has created a legislative framework since 1994 to make the drive for educational equality possible. This includes the South African Schools Act (1996), the Employment of Educators Act (1998) and the various Acts affecting labour and employment equity. So, for example, the Western Cape Education Department (WCED), one of the nine provinces in control of primary and secondary education, has an Employment Equity Plan (EEP) in line with the provincial and national government's Employment Equity Framework to which all role players such as School Governing Bodies (SGBs) and line managers have to adhere. All line managers have to consciously and committedly endeavour to narrow the race, gender and disability gaps on all levels, as well as all occupational categories (WCED, 2006).

The DOE has also tried to address the socio-economic disparities between state schools of the rich and the poor. The poorest schools now have a no-fee policy and the various state schools have been classified into one of five quintiles. Based on

factors such as the quality and quantity of physical plant, socio-economic status of the area where the school is situated, class sizes, etc. the schools are placed in the hierarchy of quintiles to determine the level of funding, the poorest schools receiving much higher levels of funding than those who have better facilities or serve higher income groups.

Racial integration at schools is progressively taking place, but class has replaced race as the determining factor of the quality of schooling pupils get. The former White, privileged schools now draw large numbers of pupils from the black middle-class whereas the former black, disadvantaged schools enroll mostly the children of the black working class who attend schools where the culture of teaching and learning has been seriously eroded. Private schools for the children of the economic elite, black and white, have been established in increasing numbers, showing again that class has replaced race as the determinant of who gets a good basic education.

One of the key areas in which AA has been applied worldwide, is selection for higher education. In India, Malaysia, the U.S.A. and South Africa the AA policies have been applied in respect of admissions requirements for university and college entrants based on race/ethnicity, caste and class factors. These policies have always been contested and they have often led to Supreme/High Court litigation questioning the constitutionality of the AA policies. The classical examples of the U.S.A. have been the 1977 Bakke case (Time, July 10, 1978), Hopwood et al vs State of Texas (Orfield & Miller, 2000) and the 2003 Univ. of Michigan Law School Case (Wise, 2005).

In South Africa, where blacks were denied equal access to leading universities in the Apartheid era, the preferential or differentiated admissions policies based on race, ethnicity or class which were adopted even before the arrival of democracy in 1994, were accepted with much less outcry from conservative constituencies than in the U.S.A. So for example the University of the Western Cape adopted an admissions policy in the 1980s based on reducing race/ethnicity, gender and rural imbalances, as well as the socio-economic status of parents (Herman, 1995). Because of the historical inequities in higher education admissions of black students, universities were increasingly required to equalize opportunity for disadvantaged black students, in an attempt to level the playing field. Meritocracy only or colour-blind admissions could, in the context of redress after Apartheid, be seen as a way to perpetuate racial inequalities. So AA in the areas identified by Claassen above has been applied widely in South Africa, in line with Section 1 and 9.2 of the Constitution and the Bill of Rights. The Employment Equity Act of 1998 requires all universities to have an Employment Equity Plan, the progress of which has to be reported on annually, inter alia, to reflect on progress in diversifying student populations and academic appointments of black staff at all levels of the academy. With only a few exceptions, the twenty two universities in South Africa had a majority black student enrolment in 2015.

Unlike the U.S.A. where the affirmation of minorities (Blacks, Hispanics and indigenous Indians) has been controversial and often struck down by courts as reverse discrimination, AA is part and parcel of the transformation of education in South Africa. The main issues at stake in South Africa are the pace and internal dynamics of educational transformation towards racial and gender equity. The key

question is to what extent these AA policies are successful as mechanisms for redress.

Recent trends in AA

The deracialisation of primary and secondary schooling has proceeded apace over the past two decades. Before 1994 there were prestigious White state schools (called Model C schools post 1994) and private schools where the pupils were virtually exclusively white. Through the new South Africa policies of AA and redress, these schools are now to a large extent multi-racial, some with black enrollments of more than 70%. In terms of deracialisation, the AA enrolment policies have worked, but because of the increasing fees of these schools, they are unaffordable for the poorer parents whose children attend the black state schools which constitute nearly 90% of the schools in the country. This confirms the view that class has replaced race as the determinant of who gets a good primary and secondary education. The difference in quality of education in Model C/private schools and state urban/ghetto and rural black schools is still massive. Although South Africa spends 22 – 23% of its annual budget on education, the quality of education of the nearly 90% of schools in the country situated in urban working class and slum areas as well as rural areas, is extremely low by international standards. South Africa is consistently rated in the bottom tier of the annual TIMMS tests in Science and Mathematics held in about sixty countries. The ethos and quality of state schools has increasingly deteriorated since the late 1970s after schools were used as sites of political struggle for liberation. The situation has worsened since democracy as the culture of learning and teaching has been seriously eroded to the point where more than 50% of the state schools are now (2016) educationally dysfunctional. Although AA has worked well in deracialising the former White schools since the arrival of democracy 23 years ago, it has to a large extent benefitted only the children of the rich and middle-class black parents. The neo-liberal economic and educational policies have exacerbated the class divide to make South Africa the country which now has the widest gap between the rich and the poor in the world as measured by the gini coefficient.

Criticism of AA

In 1993, a black analyst (Vincent Maphai, 1989) contended that the entrenchment of AA in the constitution provides a legal base for discriminatory legislation, and continues to perpetuate one of the cornerstones of Apartheid – namely, that it is acceptable to use state resources to advance certain groups over others. He stated that AA involved dubious criteria for reward – race and gender – which have always been regarded as obnoxious features of Apartheid, thus sanctifying racial preference rather than equality as a constitutional principle (Maphai, 1991, p. 7).

Another criticism is that AA focused on race and facilitates the acquisition of wealth by an already privileged enclave because it does not seek to eliminate or even reduce class distinction. This is countered by the argument of creating useful role models and the pride they generate among potential emulators. However, this seems to be overshadowed by the destructive racialization of society as the price that has to

be paid for the success of a few. Even the successful few may feel degraded and inferiorised if their success is attributed to supportive policies rather than own achievement (Adam, 1997, p. 247).

The late Dr. Neville Alexander, a renowned social analyst and former political detainee in the Robben Island jail of the Apartheid state, expresses his grave reservations about AA policies in a published lecture he gave in 2006 at the University of Fort Hare titled "Affirmative Action and the perpetuation of racial identities in post-apartheid South Africa" (Alexander, 2007). He debated what he sees as the troubling relationships between the policy of AA and the perpetuation of racial identities. He saw it as one of the unintended consequences of the policy for which we should give the architects of it the benefit of the doubt (Alexander, 2007, p. 92). He critiques the policy and as an avowed socialist, he suggests a socialist alternative but was vague on how it is to be implemented (Alexander, 2007, p. 105).

Conclusion

This analysis has tried to capture the success and limitations of Affirmative Action and Black Economic Empowerment in post-Apartheid South Africa. Like the cross-national comparative equivalents in Malaysia, India and the U.S.A. these are highly contented policies in South Africa. After centuries of Apartheid they were inevitable and have to a limited extent shown progress towards equality in education and the workplace for black South Africans. However, these policies remain controversial because in principle and in practice, they enhance social engineering and economic advancement based on race/ethnicity, gender and disability. The divide between rich and poor continues in South Africa despite these attempts to develop a more egalitarian, non-racial society. The struggle continues! Aluta continua!

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Emeritus Prof. Dr. Harold D. Herman, University of the Western Cape, South Africa,
haroldherman@mweb.co.za

Marco Aurelio Navarro Leal

Commodity versus Common Good: Internationalization in Latin-American Higher Education

Abstract

The aim of this paper is to explore the meaning of internationalization using some Latin American experiences of higher education, to identify two views of this activity and pose the need for reflection upon internationalization as a means that should correspond to pedagogical ends in the context of globalization.

Keywords: internationalization, higher education, Latin America, globalization

Introduction

During the last decades, the international interaction that involves educational matters between countries has been growing in such a way that the old meaning related to student's exchange has now diversified the array of activities and views. The aim of this paper is to explore the meaning of internationalization using some Latin American experiences of higher education, to identify two views of this activity and pose the need for reflection upon internationalization as a means that should correspond to pedagogical ends in the context of globalization.

To pursue this aim, we divide the paper in three sections: in the first we explore the meaning of internationalization; in the second, we comment about two views of internationalization using some Latin-American experiences; and at the end, we make some reflections about these academic activities.

To internationalize universities

The universities of some capital cities have always been international. During the renaissance, with a passport issued by the Pope, students used to travel from different European places to Bologna, or to Paris, or to Oxford, or Salamanca, to look for a lecturer and learn from him. In Gargantua and Pantagruel, Rabelais makes a hilarious account of the mobility of international university students of that time. Those universities were international; and currently, those universities located in cosmopolitan cities of the world (London, Paris, New York, Boston) are recognized as being international. They reflect the conditions of their environment.

Currently, there are more than 4000 institutions of higher education in America Latina with more than 12 million students (Fernández Lamarra, 2005) all scattered in very different surroundings, but why do they want them to be international, as recommended by higher education policies?

In the last decade of XX century there was a new scenario for universities in the form of a global society with a greater mobility in the labor market of an economy more interested in knowledge (Moreno León, 2001). In the same way that economic

systems went to a new geopolitical order, where countries regrouped themselves, higher education systems went to establish similar relations with different degrees of success. There was a need to inter-connect economies and there was also a need to inter-connect higher education systems. The European Community, for instance, has been working towards an integration of a higher education system through what is known as the Bologna Declaration that leads to the European Space of Higher Education (Mora, 2005; Olmos & Torres, 2016).

Latin American economies are not integrated in one block, like the European Community. Nevertheless, in the context of the restructuring of international capitalism, called “globalization”, in the American continent there have been some sub-regional groupings, like the North American Free Trade Agreement (NAFTA), the Centro American Common Market (MCCA), or the Common Market of the South Cone (Mercosur).

Economic grouping involve internationalization of higher education as an answer to cope with new demands, like the Plan for Regional Integration of Central American Higher education (Plan de Integración Regional de la Educación Superior Centro Americana) (González García & Muñoz Varela, 2010), or the Iberoamerican Space of Knowledge (Espacio Iberoamericano del Conocimiento) which main objective is “to develop a space of collaboration and interaction in research and higher education as propellers for generation of scientific and technological knowledge” (Toscano, 2009, p. 85).

For internationalization there is an array of practices that go from a restricted meaning like traditional notion of exchange of students and faculty, to a more elaborated and comprehensive meaning, that in terms of Jane Knight (2008), “incorporates an international, intercultural or global dimension to the objectives, functions and organization of all activities of university, not only in curricular activity, but in research, university services and teaching”.

Internationalization in universities has taken different paths and meanings. Usually, it is motivated in terms of collaboration, although some scholars have identified some competitive approaches, especially when internationalization is driven by market forces.

According to Hans De Wit (2005) from exchange of students, faculties and agreements it is observed that “international dimension of higher education is becoming more oriented towards competence between universities, between higher education sectors and between different regions”; especially after the inclusion of education services into the regulations of the World Trade Organization, a new set of terms navigate the internationalization discourse, such as transnational education, borderless education, education abroad, overseas education, international trade of educational services, and so on. Mobility is no longer an exclusive activity of students and faculty; nowadays it is also an activity of programs and universities as well.

Commodity versus public good

In this context, it is possible to identify two confronting views of internationalization. On the one hand, there is a competitive internationalization that is a dependent variable of economic globalization (Wit, 2005). It is conceived as one of the reactions of universities to the challenges and opportunities of globalization.

Competitiveness is the locus for these institutions to gain international visibility and benefit from abroad. Internationalization becomes part of a marketing program for the attraction of fees and grants. In this perspective, according to Zarur (2008), education becomes a commodity.

On the other hand, there is a solidarity internationalization, which according to Zarur (2008) includes a set of cooperative activities between universities from different countries for mutual benefit; to broaden the possibilities for increasing knowledge and the development of other cultures; possibilities of agreements to devise joint exchange and mobility programs for increasing the feeling of membership to the region and enrich the education of students, faculty and researchers in the aim of Latin-American and Caribbean integration.

In this perspective, solidarity internationalization becomes a horizontal activity that may influence the institutional and public policies in the updating of faculty, in the supply of programs for undergraduate, graduate, continuing education; in social and linking or extension activities to society, and especially in the overall universities contribution to development. In this perspective education becomes a public good instead of a commodity.

Among Latin American scholars the assumption of education as a public good has gained a high level of consensus. Evidence of this was manifested in both, the Regional Conference of Higher Education of Cartagena in 2008 and in the World Conference of Higher Education of Paris, in 2009, where “the definition of ‘public good’ was strongly supported by Latin-American participants confronting this view with participants from developed countries” (Fernández Lamarra, 2012).

In relation to the notion of higher education as a public good and knowledge as a social good, in the same year of the Cartagena Conference, Tunnerman expressed that “there is still a battle going on facing the claims of certain organisms, among them the World Trade Organization, for reducing these notions to mere categories of commodities under the rules of the market” (2008, p. 39).

Competitive internationalization

During the last decade the university “rankings” have played a major role in the international merchandising of universities. On them, every year, quite the same universities are in the first places and the rest of the institutions want to be located in a place near to them in order to resemble the models. This is a source of reputation and a symbol of prestige to attract more clients. Forget about promoting a university model that eventually could lead to isomorphism.

More recently, there have been the university fairs in Latin American major cities. The largest is the International Education EXPO Road Show, which “offers international education institutions, of any discipline and from any country, the opportunity to present their courses to thousands of pre-selected and pre-screened students in Mexico's most productive markets during Mexico's leading International Student Recruitment Fairs”.

There are reasons to attend the Mexican EXPO Road Show, the website refers that the 21st International Education Mexico EXPO Roadshow held in the spring of 2012 received over 22,600 students for the total EXPO. Mexico is the 11th largest economy in the world, and consistently ranks among the top ten countries sending

students to the USA and Canada. There are more than 24,000 students choosing to study abroad, selecting destinations such as Spain, UK, and USA.

This fair not only goes to the three largest cities in Mexico, it goes also to most of the major cities in Latin America twice a year. Organizers arrange all logistics, accommodation, transportation and translation needs.

One more example of this competence driven internationalization will be different supply modes of educational services ruled by the World Trade Organization. There is the case of the Laureate Group, who is buying private universities in different countries to act as ‘for profit’ universities. Or the case of virtual institutions like Phoenix University, or Northern University, which sell courses and graduate degrees, that at the end have to be validated by a local university in order to have a certification for work.

In the competitive internationalization there is an exacerbated motivation for academic mobility, the fees paid by foreign students to universities of United States, Canada and Europe represent a very interesting financial flow, given that every year many countries have a good budget to invest in human capital; but not only that, foundations are also prepared to deposit a good amount of grants to support “world class universities”.

Solidarity internationalization

Of course, not all internationalization in Latin America is competitive in orientation, there is also solidarity internationalization. This, as we have said some lines above, is referred to activities agreed by networks of colleagues from different countries, for the sake of sharing academic experiences and resources, usually through student and faculty mobility or developing common research projects, lectures, conferences, and so on.

This is the case, for instance, the activities carried out between colleagues from the neighboring states of the Autonomous University of Sonora, in México, and the University of Arizona; or the Autonomous University of Tamaulipas, in México, and the University of Texas. Even without a formal agreement between institutions, colleagues have spontaneous and productive academic interactions.

The narratives by Vega (2012) and by Parrino and Efron (2012) exhibit an account about how, during more than a decade, the annual conferences of University Management in South America have been an instrument to develop different international initiatives. Besides mobility of students and faculty, other activities have evolved, like the publication of collective books and journals, collaborative dissertation committees and the organization of lectures by visiting scholars.

According to Vega (2012), these conferences started “by virtue of the personal relationship” between professors of the Group of Research in University Management from the Federal University of Santa Catarina, Brazil, and the National University of Mar del Plata, in Argentina. Through the years, the annual conferences have been organized by universities in different countries like the National University of Tres de Febrero (Argentina), the Regional University of Blumenau (Brazil), and the Universidad Tecnológica Intercontinental (Paraguay) and recently the Universidad Veracruzana (México). Every year the attendance to the conference becomes more international with delegates from universities throughout Latin American countries, who are prepared to contribute in any academic initiative.

In the context of economic agreements celebrated between governments, there are some organizations that have been set up to help internationalization, for instance the Consortium for North American Higher Education Collaboration (CONAHEC) which was founded on the light of the North American Free Trade Agreement (NAFTA) with some financial support from the Mexican Undersecretary of Higher Education, the US Fund for the Improvement of Post Secondary Education (FIPSE) and the Canadian Western Interstate Commission for Higher Education (WICHE). With the time, more organizations have supported CONAHEC initiatives such as the Ford Foundation, and the LUMINA Foundation.

Experience has shown that initiatives based upon personal relationship of participants, with a spirit of solidarity, tend to be more successful over time than those initiatives based only in marketing grounds.

Final thoughts

Universities, to cope with new political, economic, technological and environmental demands of globalization, are called to participate in activities that allow students and faculty to interact with their peers from other countries, not only with the aim of becoming more competitive, but also to recognize cultural diversity and develop a compromise with global problems. Therefore internationalization has been assumed by universities as a policy for institutional development.

Nevertheless, in this paper we have identified two views of internationalization categorized as competitive and solidarity. We have related to some experiences from Latin America to illustrate the two categories, but the purpose for doing this is to bring about a reflection about why do we need internationalization? And what kind of internationalization do we want?

Since internationalization is not an end, but a means to enrich education, we have to connect our questions to the aims of education, which in time are connected to the construction of a particular society. To look at education as a commodity means to place principles, values and history of society in a second place since principles that should govern from this perspective are the principles of the market, which in the new context is the global market, with a future of alienation of the next generations.

On the other hand, there is a different view of internationalization that looks at education as a process of solidarity cooperation for mutual benefits, assuming with respect the different cultures, and with the aim of constructing a society according to the values and principles of equity and inclusion. Thus, internationalization is not an end in itself, but a means related to particular pedagogical ends to cope with new global demands.

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Dr. Marco Aurelio Navarro Leal, Universidad Autónoma de Tamaulipas, México,
mnavarro@uat.edu.mx

Obed Mfum-Mensah

Education and Communities at the “Margins”: The Contradictions of Western Education for Islamic Communities in Sub-Saharan Africa

Abstract

This paper employs postcolonial framework to discuss the contradictions of promoting western education in Islamic communities in sub-Saharan Africa (SSA). Prior to colonization, Islamic education was an important socializing process that instilled strong Islamic identity in Islamic communities in SSA. European encounters in SSA and the introduction of western education shifted the socializing process and reconfigured SSA societies and dislocated Islamic communities in the region. I argue that Islamic communities’ marginalization educationally since the colonial era is partly the result of their resistance to western colonization and all its forms. In the first part of the paper I discuss postcolonial discourse and education. The second part discusses education and religion nexus in sub-Saharan Africa. It uses recent Pew Research for example as evidence to delineate the Muslim-Christian gaps in education by age categories and gender. The third part outlines ways western education became a tool for reconfiguring Islamic communities and the rationales behind Islamic communities’ resistance to this form of education. The concluding section discusses contemporary efforts to promote education in Islamic communities in SSA within the rubric of Education for All (EFA).

Keywords: education marginalization, Education for All, religion and education, colonialism, Islamic education

Introduction

Many traditional Africans encountered Islam and were morphed into strong Islamic communities before western colonization. For many of these communities, Islamic education became a major socializing process for promoting strong Islamic identity. Colonization and the introduction of Christian and colonial education shifted the socializing processes and reconfigured SSA societies culturally, socially, economically and politically. This paper discusses the contradictions of promoting western education in Islamic communities in colonial and postcolonial sub-Saharan Africa (SSA). I acknowledge that Islamic communities in SSA are not a homogeneous group and how western education affected Islamic communities should be placed within the contexts of the colonial territories. I argue that Islamic communities’ marginalization educationally since the colonial era is partly the result of their resistance to western colonization and all its forms. In the first part of the paper I discuss postcolonial discourse and education. The second part discusses education and religion nexus in sub-Saharan Africa. It uses recent Pew Research for example as evidence to delineate the Muslim-Christian gaps in education by age categories and gender. The third part outlines ways western education became a tool for reconfiguring Islamic communities and the rationales behind Islamic

communities’ resistance to this form of education. The concluding section discusses the contemporary efforts to promote education in Islamic communities in SSA within the rubric of Education for All (EFA).

Postcolonial discourse

The literature outlines the relationship between colonial and postcolonial education policy reforms (see Bray, 1993; London, 2003). Jurgen Osterhammel views colonialism as a relationship of domination between an indigenous (or forcibly imported) majority and a minority of invaders, and a system of governance by which colonizers define and implement the fundamental decision affecting the lives of those colonized in pursuit of the colonizers’ interests in a distant metropole (Osterhammel, 1997). The literature highlights three stages of colonialism: *classical colonialism* is the subjugation of an indigenous society by a foreign power; *internal colonialism* is the domination of a nation (defined geographically, linguistically, and culturally) within the national borders of another nation-state by another group or groups; and *neocolonialism* is the domination of the industrialized nations over the Third World in different forms (Bray, 1993). Colonialism is also an ideological perspective and a state of mind in colonizer and colonized alike which began when colonizers arrived on the scene and continues when they go home (London, 2003). Colonialism relates to postcoloniality in how the former shapes the latter. Postcoloniality is a new designation for critical discourse that thematizes issues emerging from colonial relationships and their aftermath, covering a long historical span. It is a concern to renarrativize the story of the colonial encounter in a way that gives prominence to issues that have to date been put on the periphery of the education debate as it concerns colonial societies (London, 2003). London suggests the need to examine and understand the complex ways in which colonial powers brought the colonized under their imperial system because the impact lingers on after nations attaining independence (London, 2003). Discussions on postcolonial education achievements in Islamic communities in formerly colonized nations in SSA must be placed in contexts of educational policies and educational objectives that prevailed in a particular nation in the colonial era.

Religion–education nexus in sub-Saharan Africa

Educational attainment for Islamic communities in sub-Saharan Africa is crucial for the global EFA initiatives. In 2010 an estimated 248 million Muslims lived in SSA and are projected to reach 670 million by the mid-century. Majority of young Muslim adults in the region lack basic education (Pew Research Center, 2016). The literature draws a link between religious affiliation and educational attainment in SSA and also outlines the complex ways religion is a source of the sometimes tensions between Muslim and non-Muslims and the contestation and shifting identities, educational marginalization and economic disempowerment of Islamic communities (Chande, 2008; Stambach, 2010; Izama, 2014; Pew Research Center, 2016). In sub-Saharan Africa, Muslims have fewer years of schooling and are less likely to be literate than Christians. Similarly, Muslim children are less likely to be in school than Christian children (Dunbar, 2000; Izama, 2014; Pew Research Center, 2016). A 2016 Pew study finds large differences in education between Muslims and

Christians in sub-Saharan Africa in general and not only that but the educational disparities between Muslims and Christians in SSA have grown in recent generations. The Pew study shows that Muslims are more than twice as likely as Christians in SSA to have no formal schooling. For instance, the data shows that 65% of Muslims and 30% of Christians have no formal education in SSA. The study reveals further that in 18 of the 27 sub-Saharan African countries with substantial Muslim and Christian populations, Muslims are more likely by at least 10 percent points than Christians to lack formal education. The Muslim-Christian education gap in SSA is also persistent among genders and generations (Dunbar, 2000; Pew Research Center, 2016). Nigeria presents an interesting example of the situation where adults between the ages 25-34 who participated in the study in 2010, 42% of Muslim men and 63% of Muslim women has no formal schooling compared to 8% of Christian men and 19% of Christian women (Pew Research Center, 2016). In terms of generational trends and education in SSA, the Pew study shows that 79% of Muslims compared to 52% of Non-Muslims between the ages of 55-74 lacked basic education. In the same way slightly above 61% of Muslims and about 30% of Non-Muslims between the ages of 35-54 lacked basic education. Furthermore, 57% of Muslims and 24% of Non-Muslims ages 25-34 lacked basic education. Religious factors are linked to the expansion as well as the decline of education and particularly, the economic impoverishment of Muslim communities (Stambach, 2010).

Islam, Christianity and colonization in sub-Saharan Africa

African societies had organized religious and political systems for centuries before the arrival of Islam and Christianity. Both Islam and Christianity reconfigured African societies and their established religions. Islam predated Christianity in West and East Africa. The goals of Islamic education since the pre-colonial era include proselytization and promotion of Islamic ideology and identity. These goals helped create Islamic imprints in SSA and the development of literacy through Qur'anic schools, Medersas, and Islamic scholarship. Islamic education helped solidify a unified African-Islamic identity, promoted learning, and offered interactive spaces for Muslims to cultivate values and piety (Danbur, 2000; Babou, 2003, 2010; Jammeh, 2012).

Islamic educational influences in Senegal, The Gambia, Mali and Nigeria predated Europeans. Scholars have discussed the ways Islamic education unified Islamic communities and helped build strong Islamic identity in communities in SSA (Dunbar, 2000; Levtzion & Pouwels, 2000; Reichmuth, 2000; Jammeh, 2012). The first European travelers in West Africa in the 15th century noted the existence of expansive Qur'anic schools in the region (Babou, 2003; Jammeh, 2012). In The Gambia, the traditional Islamic schooling known as "Majlis" was grounded in many parts of the Muslim population. Education historian Burama Jammeh notes that around 1751 about fifteen predominantly Moslem communities called Morikunda were spread across parts of Gambia. These places are still recognized as centers of traditional Islamic educational establishments (Jammeh, 2012). Similarly, Nehemia Levtzion and Randall Pouwels discuss ways Islamic education itself carved an exclusive Islamic enclave and communities in West Africa. They note for instance that scholars in Timbuktu lived as autonomous community known as Diaba, "the

scholars’ town” under leadership of the *qadi* or the Muslim Judge. They also point out that in the 16th and 17th century Bornu Gazargamo, the capital of Bornu in modern day Nigeria was an important center for Islamic learning. Bornu scholars officiated as teachers and Imams in Hausaland, Yorubaland, and Borgu. They noted that by the end of 18th century Islam was deeply rooted in the everyday life of the ordinary man in Bornu (Levtzion & Pouwels, 2000).

Islam, colonialism and western education in sub-Saharan Africa

Islamic education was a major tool that helped Islamic communities in SSA to consolidate power (Dunbar, 2000; Reichmuth, 2000; Iddrisu, 2002). The balance of power shifted to non-Islamic groups during and after the colonization of SSA territories. The tool that spurred the power shift was western forms of education (Chande, 2008). The introduction of western education in SSA reconfigured the economic and power dynamics in colonized societies in SSA in tremendous ways. The proselytizing and “civilizing” agenda of western/Christian education sometimes created tensions and suspicion in Islamic communities. Islamic communities subtly and sometimes fiercely resisted western education. Western/Christian education succeeded mostly in non-Muslim communities. In predominantly Islamic populated areas of colonial territories in The Gambia, Senegal, northern Nigeria, the coastal parts of Kenya, parts of Sierra Leone, and northern Ghana, Christian missionary education was introduced in the context of a predominant Islamic society (Chande, 2008; Jammeh, 2012; Skinner, 2013). Burama Jammeh points out that in the British colony of The Gambia, the Muslim elders in the city area organized themselves into an association and established a school called Mohammedan school in order to offer Islamic and Arabic curricula to Muslim children. They did this to undermine the western form of education provided by the Christian missions (Jammeh, 2012).

The Christian missionaries encountered strong resistance and opposition to Western/Christian education in Muslim communities for several reasons. First, for most Islamic communities, Islam had been for centuries the basis of a universal identity (Babou, 2003; Bell, 2015). Muslim communities came to view western education as alien cultural process that belonged to the infidels. Islamic communities also viewed western education as a subtle and benign strategy to Christianize Muslim children and shift the Islamic communities’ socio-political arrangements and identities and part of the larger order comprising western education and colonial administration (Bell, 2015). Islamic communities cited western education’s promotion of certain religified norms as evidence that enrolling their children in western education would be tantamount to conversion to Christianity or learning the ways of the colonizers and therefore were hesitant to enroll their children (Chande, 2008; Izama, 2014). To address this skepticism the British colonial administration in West Africa for instance allowed the establishment of English/Arabic schools in some colonies like Ghana to provide Muslim families with an alternative to sending their children to Christian schools (Skinner, 2013).

Since colonization many Islamic communities have demonstrated apathy toward western forms of education because colonial era brought considerable social, political, and economic changes for Muslim and non-Muslims alike in SSA. Colonial rule imposed new systems of law which generated resentments in many colonial territories (Babou, 2003; Loimeier, 2013; Bell, 2015). Islamic communities

in French colonies of West Africa for instance used Islam as a cementing force to unite West Africa and inculcate distrust for foreign invaders (Bell, 2015). The negative views of some Christian missions and colonial governments toward Islamic communities in some colonial territories sometimes added to the tensions which reinforced Muslim communities to resist western/Christian education.

The colonial governments sometimes implemented policies of exclusion in heavily Islamic communities for political expediency (Oketch & Rolleston, 2007; Abdurrahman, 2012; Izama, 2014). Both Abdurrahman (2012) and Izama (2014) point out that the colonial government's exclusionary tactics in places like northern Ghana and northern Nigeria were a strategy to pacify Northern emirs whose territories had been forcibly occupied. Governor Lord Lugard prohibited the establishment of Christian mission schools in Northern Nigeria, because he did not want to risk destabilizing a well-functioning system of indirect rule via Muslim chiefs. The British colonial administration in the Gold Coast colony (Ghana) also deliberately restricted expanding education in northern Ghana in order to preserve the region as a labor pool for the colony (Idrisu, 2002; Mfum-Mensah, 2005). The British colonial administration however established Hausa constabulary schools for Muslim Hausa boys who had fled from Nigeria to Ghana. These errant boys were provided rudimentary education in English language and basic subject and recruited into the colonial police in Gold Coast to serve as guards of British property and to consolidate colonial authority and keep the peace in Gold Coast (Skinner, 2013).

Some colonial governments were also suspicious of Islamic communities and even placed some Islamic African leaders under surveillance (Babou, 2003; Loimeier, 2013). In the French colony of Senegal, the colonial government became apprehensive to Amadu Bamba, the leader of the Islamic sect of Murid and viewed the Murid religious ideology as a threat because Muridiyya education was based on encouraging members to involve in hard work and productive ventures. The teachings of Murid focused on farming and many who became adherent to the Murid ideology and Muridiyya education made strong contribution to the Senegal economy. The French colonial administration saw this as a threat to the colonial government. It exiled Bamba and after his return from exile, was put under house arrest until his death (Babou, 2003). Similarly, German colonial administration viewed Muslim communities in Tanganyika and other territories in East Africa with apprehension to the extent that at the German Colonial Congress in Berlin in 1905, Islam became the central theme of German colonial politics. A few of the German colonizers who did not see Islam as a threat in German colonial territories nonetheless saw Muslims as the "other" that needed to be civilized (Loimeier, 2013).

Prior to colonization many strong Islamic communities existed who were sometimes ruled by the *imam* or *qadi*. Formal colonization introduced colonial laws, taxes and western education which reconfigured the Islamic social arrangements and led to the Muslims' adaptation to the modern colonial state (Loimeier, 2013). Islamic communities resisted colonial rule but many also found multiple paths to accommodate the colonial rule and identified with aspects of the modern state in particular, in the area of education. While, Muslim communities may have

accommodated western education they became wary of enrolling children in schools whose overt mission was religious conversion to Christianity (Loimeier, 2013).

Conclusion: Efforts to promote enrollment of Muslim children in SSA

During colonization Muslim leaders in colonial territories acted outside the state. After independence Islamic communities found themselves at a disadvantage because they did not have the requisite education and skills to participate in the political and economic processes of the society. High positions in government fell to non-Muslims educated in Christian mission schools. Some Islamic communities continue to promote stricter forms of Islam rather than on achieving educational modernization of their youth to prepare them for the competitive job market (Chande, 2008). In the early days of independence, some Muslim parents still associated modern schools with Christianity and colonization and therefore were reluctant to enroll their children in modern schools. In the former French colony of Mali for instance, Muslim parents refused to send their children to school because they still saw western education as a threat to their Muslim beliefs and sensibilities. This situation partly explains the continuous Muslim-Christianity disparity in school enrollment in postcolonial SSA (Chande, 2008; Bell, 2015).

There have been recent initiatives to integrate Islamic forms of schooling in national education system in some SSA communities as part of the campaigns for Education for All. Things are changing now and many Islamic communities in SSA have come to gradually accommodate and embrace western education. We should note that the education and religious-based social stratification in SSA demonstrates that Islamic communities were not passive recipients of western education but interrogated this socialization process (Babou, 2003).

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Prof. Dr. Obad Mfum-Mensah, Messiah College, Mechanicsburg, Pennsylvania, USA, omfum-mensah@messiah.edu

Octaviano García Robelo & Ileana Casasola Pérez

Resilience and Intercultural Education on Secondary School: A Comparative Study in Mexico and Germany

Abstract

This paper presents one product of a research report about the promotion of resilience in the school setting in two public secondary schools, located in Mexico and Germany, and its relation with the pupils' multiculturalism. The paper focuses on the need of the results' analysis to identify the school actors' perceptions of the promotion of resilience at the secondary school, in contexts where pupils' cultural characteristics are highly diverse. The theoretical guidelines are linked to resilience research, especially research focusing on resilience in schools, as well as to studies on intercultural education. A mixed method was used; it is a dual comparison in two geographical, economic, political and cultural different national contexts, where the analysis unit was "the school". Research was conducted with secondary schools' principals, including the teaching staff, from both schools and with a first graders group on Telesecundaria 42, in Hidalgo, Mexico, and one group of the same grade from a Realschule in NRW, Germany. The results provide significant data that show a strong nexus between students' and teachers' perceptions of resilience development at the school. This article focuses on resilience promoting factors. It was concluded that positive emotional relationships between students and teachers build resilience and decrease risks of failure and dropout.

Keywords: resilience, intercultural education, secondary school

Introduction

Since the last decade of the twentieth century the world community has witnessed the multiple effects of economic and technological globalization. These effects have allowed the free movement of goods and knowledge on the planet as well as the mobility and flow of people and cultures all over the world. Hence an inescapable multicultural mosaic has emerged, which has become subject of the political agenda of most nations.

Diverse studies have pointed out the effects of this global era in school, saying it is a space in which different views, traditions, preferences, languages, expectations, knowledge and skills of students and teachers come together every day (Tenti, 2000). The place par excellence oriented to serve the youth is secondary school, school for teenagers. Since late last century, this educational level has become mandatory and final stage of basic education in Mexico and in most of the Western countries that share the goal that entire population reaches a minimum schooling of 10 to 13 school years (Sourrouille & Lopez, 2012).

Teens attending Mexican and German secondary school live, directly or indirectly, the effects of native and non-native migration, respectively, and they must be able to reconcile several strange codes and cultural values, different linguistic patterns, attend a standardized curriculum that does not consider the

different rhythms and styles of learning, nor its physical, motor and cognitive skills or maturation levels. This places them at a risk situation, because the circumstances of schooling are not favourable. Thus, inside the homogeneous school the heterogeneous students live insecurity processes, incomprehension, rejection and academic difficulties, which can become stressors and promoters of failure and dropout, both in Mexican (Canales & Dimas, 2010; Hernandez & Cabrera, 2014) and German secondary school (Ertl, 2006; Faas, 2008).

Therefore it is important to examine promotion resilience in secondary school. Working from this approach favors the identification and promotion of students' strengths, as well as the development of processes to face and successfully cope with diverse vital difficulties (Henderson & Milstein, 2007), as those faced in school settings.

The overall goal of this study was to analyze the actors' perceptions of the resilience promotion in the secondary school in a national context where students' cultural traits are highly diverse. The approach is based on intercultural education discourses.

This article presents an overview of two school actors' (i.e., students and professors) perceptions of the risk decrease and resilience promotion in a Mexican and a German secondary school.

Resilience and intercultural education

The use of the resilience concept in social sciences within the context of human sciences occurred in the 70s in the Anglo-Saxon world. Resilience approach emerged from efforts to understand the causes of Psychopathology; studies showed that there was a group of infants who did not develop psychological problems despite researchers had predicted so (Masten, 2001; Grotberg, 2006). The first step was to assume that those children were positively adapted because they were "invulnerable" (Koupernik, quoted by Rutter, 1991; Garcia-Vega & Domínguez, 2013); that is, they could "resist" adversity. The second step was to propose the concept of resilience instead of "invulnerability" because resilience can be promoted, while invulnerability is considered an intrinsic individual's feature (Rutter, 1991; Garcia-Vega & Domínguez, 2013).

However, conceptions about resilience can be grouped into two poles. On the one hand, resilience is linked to the idea of resistance to trauma and the ability to overcome it, resilience is closer to an existential dynamics. From this view, authors insist that resilience is not a state, but a dynamic process that begins with contact with the other – educator, family, friends, etc. (Martinez & Vazquez-Bronfman, 2006).

Therefore, resilience as a process expands its potential to explain and promote critical, proactive and autonomous personalities, while opening the individual to the social sphere. At the same time, the concept of resilience as "capacity", that just some people would have, has turned into "process" that we all can develop. Thus, resilience "refers both to individuals in particular and school or family groups being able to minimize and overcome the harmful effects of adversity and disadvantaged contexts and sociocultural deprivation" (Uriarte, 2006, p. 13).

Closely related to the above-named idea, in the last three decades the perspective of "intercultural education" has been mentioned in academic speeches

and recommendations of international organizations, such as UNESCO, aiming to promote the emergence of societies tending to justice and equity (Jablonska, 2010). Thus, some European countries, such as Germany, that had developed educational proposals for care to immigrant populations who joined school spaces in the second half of the twentieth century, in the context of the post-war period and the technological revolution, changed by the mid-nineties their discourses to include the intercultural education view (Directorate General for the Internal Policies of the Union, 2008). According to Velasco (2010), this did not happen in Mexico, because even though in the 90s an intercultural bias was introduced in education, it was only aimed at the field of indigenous education, which turned from “bicultural bilingual education” (Spanish-Native Mexican Language) to “intercultural bilingual” (Spanish-Native Mexican Language, again). Thus, even though since 1992 national multiculturalism was constitutionally recognized, it was with the publication of the National Education Program 2001-2006 (PNE 2001-2006) that the interest of introducing a cultural bias to public education into all school modalities and levels in order to give positive recognition to different cultures.

The study

Method

A mixed method with contributions of comparative education was used. A dual comparison was designed in geographically, economically, politically and culturally very different national contexts, but sharing similarities (Manzon, 2007). The unit of analysis is “school”. It is a static comparison. Considering that it is oriented to the analysis of relations between contexts and educational synchronous processes, a cross section of the phenomenon was performed.

The selected sample was a convenience sample (Parreira, 2014). The comparison was made in a secondary school located in Hidalgo, Mexico, and a secondary school located in NRW, Germany, during the 2014-2015 school year. Differentiating, comparative criteria and relevant data for comparison criteria were established (macro and micro contextual aspects), as well as analysis categories within them.

The study was conducted with school head teachers, with a group of 13 teachers in Mexico and 11 teachers in Germany, and one 7th grade group with 23 students in Mexico and one with 24 students in Germany.

Assessment tools

In order to obtain the required information, the following techniques were chosen: document review and analysis; two different questionnaires about resilience in school with Likert-type answers were administered: one for teachers and a simplified version for students adapted from Henderson and Milstein’s proposal (2007). School principals were interviewed.

Both questionnaires were previously tested and validated; a Cronbach’s alpha of 0.90 was obtained.

This paper is a report of students’ and teachers’ perceptions of the three factors that build resilience in the school.

Results

Both questionnaires gather data about six factors (Henderson & Milstein, 2007) that promote resilience in school, which are:

1. Improving pro-social relations.
2. Setting firm and clear limits.
3. Teaching “skills for life”.
4. Providing support and care.
5. Establishing and transmitting high expectations.
6. Providing participation opportunities.

Those factors are grouped in two categories: the first three factors help to “decrease risks within the environment”, while the three remaining factors contribute to “build resilience in the environment”.

Questionnaire for teachers was made up of 36 items, six items per each factor. Two items are designed to explore the perception of students’ activities in school, other two items explore the relationships among school staff, and the last two items include the familiar context with the school.

Questionnaire for pupils was made up of 12 items, two items per each factor. It explores exclusively their perception of activities and relationships among other students.

Both questionnaires had 4 possible answers per item:

1. We are alright in this area.
2. We have made great progresses in this area.
3. We are starting to work in this area.
4. We have done nothing in this area.

For data analysis, answers in each factor were examined. According to the three factors that develop resilience within the environment, students’ data show the next results.

For Mexico, regarding the factor “providing support and care”, 56.6% of the students chose option 1, 30.4% chose option 2, and 13% chose answer 3. For Germany, percentages were 12.5%, 62.5%, and 20.8%, respectively, and 4.2% chose option 4.

In regard to factor “establishing and transmitting high expectations”, 21.7% of the Mexican students chose option 1, 73.9% chose answer 2, and 4.3% chose answer 3. For Germany, percentages were 45.8%, 50%, and 4.2%, respectively.

In regard to the third factor “providing participation opportunities”, 47.8% of the Mexican students chose option 1, 39.1% chose option 2, 8.7% chose option 3, and 4.3% answered with 4. For Germany, percentages were 8.3%, 50%, 37.5%, and 4.2%, respectively.

For teacher, the results in the same three factors were as follows. For the factor “providing support and care”, 61.5% of the Mexican teachers chose option 2 and 38.5% chose answer 3. For German teachers, percentages were 54.5% and 45.5%, respectively.

For Mexico, regarding the factor “establishing and transmitting high expectations”, 46.2% of the teachers chose option 2 and 53.8% chose option 3. For Germany, percentages were 36.4% and 54.5%, respectively, and 9.1% chose option 4.

In regard to the third factor “providing participation opportunities”, 69.2% of the Mexican teachers chose option 2, 15.4% chose option 3, and 15.4% chose option 4. For Germany, percentages were 54.5%, 18.2%, and 18.2%, respectively, and 9.1% chose option 1.

Data analysis for grouped factors showed the next results.

For Mexico, regarding the category “build resilience in the environment”, 65.2% of the students chose option 1, 26.1% chose option 2, and 8.7% chose option 3. For Mexican teachers, 61.5% chose option 2, 30.8% chose option 3, and 7.7% chose option 4.

For Germany, regarding the same category, 33.3% of the students chose option 1, 45.8% chose option 2, 16.7% chose option 3, and 4.2% chose option 4. For teachers, 45.5% chose option 2, 36.4% chose option 3, and 18.2% chose option 4.

Conclusion

After conducting data analysis, we can say that there is a close and strong nexus between students’ and teachers’ perception of the three factors that build resilience in the school in both analysis units.

This is important, since one of the specific goals of this study was to analyze and contrast the school actors’ perceptions of the promotion of resilience at school. According to Manciaux (2013), school has a prominent and privileged place as it is recognized by the community members. The school environment is the second source of security after the home and sometimes it is the only one.

We found that, although the Mexican school has more adverse conditions related to the socio economic, political and social conditions of the country, students and teachers report higher scores than the German analysis unit, especially in the factor of “providing support and care”. Data show a difference greater than 40 percentage points between the answers of Mexican and German students regarding this factor. In contrast, only a difference of 7 percentage points between the answers of Mexican and German teachers were identified; however, the same trend was observed. According to Henderson and Milstein (2007), the factor “providing support and care” is the most important aspect for the promotion of resilience in school and, moreover, it is a pillar in its building.

Therefore, it is important to note that even when discourses and policies on intercultural education are more advanced in the German context, the establishment of trust and care between students and teachers, such as those reported in the Mexican analysis unit, may contribute more effectively to the generation of school spaces that promote resilience.

Perhaps this is the biggest challenge in working with teenagers in social vulnerability: recognize them as a group, with their own needs and, thus, be able to see how the context can provide the necessary conditions for their development.

Finally, we consider important to notice that these results are maintained in the line of research that have linked intercultural perspective with the theoretical approach of resilience within school spaces. Thus, some research has been interested in investigating the relationship between immigration processes and resilience in school students in a European context from the perspective of multiculturalism; meanwhile, Martinez and Vasquez-Bronfman (2006) have incorporated this approach to working with children exiles in countries like France and Spain.

It is concluded that positive emotional relationships between students and teachers build resilience and reduce the risks of failure and dropout.

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Dr. Octaviano García Robelo, Autonomous University of Hidalgo State, Mexico,
droctaviano@gmail.com

Master Ileana Casasola Pérez, Autonomous University of Hidalgo State, Mexico,
ileana_casasola@yahoo.com.mx

Part 2

Teacher Education

Jana Kalin, Renata Čepić & Barbara Šteh

Status of Teachers and the Teaching Profession: A Study of Elementary School Teachers' Perspectives

Abstract

In scientific literature a large number of different conceptual definitions of status found that can be applied as a framework for the analysis of different professions although it should be noted that there is no single, universally accepted, unambiguous definition or theoretical construct. For example, Haralambos (1994) defined reputation as the amount of respect and honor associated with social status, characteristics of an individual and his or her lifestyle, while social status, as a determined position in the society that includes a certain role, is a set of standards that define the behavior expected of members of a certain status. In this paper, we will try to establish what points of view elementary school teachers hold regarding the reputation of the teaching profession in the society and how they rank the level of reputation of elementary teachers in relation to the reputation of other professions.

Keywords: elementary school teacher, status of teachers, reputation, professionalism, teaching profession

Introduction

From a review of available studies on professionalism and the status of teachers (Hargreaves & Goodson, 1996; Hargreaves et al., 2006; Hoyle, 2001; Monteiro, 2015; Sachs, 2003, and others) it is noticeable that a large number of definitions of the term status point to its complexity as well as its diverse and ambiguous nature. Monteiro (2015, p. 56) highlighted that the highest level of professionalism is applied to professions that have the highest social importance, responsibility and recognition, which correspond to the ideal type of professional models.

In recent decades, questions of the teaching profession, professionalism, and the need for professionalism in the context of the teaching profession and development of quality education have been in the center of educational experts' attention. Results of recent research undoubtedly show that the students' achievement greatly depends on the process of learning and teaching, but also on the teachers' role (Day, 2013; Day, Sammons, Stobart, Kington & Gu, 2007; Monteiro, 2015; Vizek Vidović & Velkovski, 2013 et al.).

Although the teaching profession has changed considerably over the last few decades, and continues to be faced with defining themselves in relation to other

professions, it is clear that over time the role and tasks of teachers have increased, while their status, compared to other professions, has remained stagnant or has even lowered as confirmed by the results of many different national and international reports. MacBeath (2012) observed that teachers, unlike most other professions, burdened with excessive expectations that society places before them, are caught between high expectations and low professional respect. The few studies conducted in Croatia (e.g. Maršić, 2007; Radeka & Sorić, 2006; Radeka, 2007) also pointed to the dissatisfaction of teachers with their social prestige and status. However, the situation is not the same in all countries. Unlike in England, France, Germany, the United States, New Zealand, and Austria, where the social status of teachers is evaluated as unfavorable, this profession continues to enjoy a good social status in countries such as Scotland, Ireland, Sweden, Finland, and Iceland (Verin, 2004 in Jukić & Reić Ercegovac, 2008).

Monteiro (2015, pp. 63-66) summarized the main features of the overall status of the teaching profession into four groups by synthesizing national and international reports and studies. These are:

- 1) *Professional and social status are not very prestigious* (lack of challenge criteria for the selection, education, evaluation, low salaries, limited teachers' autonomy, deprofessionalization and feminization of the profession, and others);
- 2) Lack of or reduced working conditions;
- 3) Diminishing importance of the teaching profession in public eye;
- 4) *Other factors* associated with the students' dissatisfaction with the school, school reforms, aggressive students and sometimes parents, and the loss of the traditional direct monopoly as a source of knowledge.

In this paper, we tried to establish what point of view of elementary school teachers hold about the reputation of the teaching profession in the society and how do they rank the level of prestige in relation to the reputation of other professions.

Method

The Scale of reputation was constructed based on a review of the theory and previous research about teacher reputation. We created eight items that shape the Scale of reputation. We included four positive and four negative statements about the reputation of teachers which were listed alternatively in the questionnaire. Statements relating to the general attitude about the reputation of teachers and the importance of teachers' work with regards to the society, the respect and relationship of parents, students, and teachers towards teachers, and the financial dimension of the profession. Teachers were asked to evaluate their level of agreement with statements on a five-point Likert scale (1 - *strongly disagree*, 2 - *disagree*, 3 - *partly agree*, 4 - *agree*, 5 - *strongly agree*).

We also asked the teachers to classify ten professions (preschool teacher, elementary school teacher, high school teacher, university professor, doctor, nurse, lawyer, entrepreneur, journalist, and stage actor) with regards to the degree of reputation on a scale of 1 to 10, where 1 means the least respected profession and 10 the most respected profession in the society. We started from Hoyle's (2001) three-component definition of the status of the profession, according to which the component of reputation (Occupational Prestige) indicates status, which is defined

by public opinion – public perception of the relative position of a profession in the hierarchy of professions.

We applied the questionnaire to a representative sample of Slovenian and Croatian teachers and analyzed the differences. The study included a total of 1,867 teachers (764 Slovenian and 1,103 Croatian teachers correctly filled in the questionnaire).

Results and discussion

Views of teachers about the reputation of the teaching profession

We determined what views elementary school teachers hold about the reputation of the teaching profession. Research has revealed that Croatian teachers achieve on average higher scores on the Scale of low reputation when compared to Slovenian teachers ($M = 4.01$ $M = 3.83$) and the differences are statistically significant. It can be concluded then that Croatian teachers have a lower perception of their reputation than Slovenian teachers. For statements which form the Scale of low reputation the difference between Croatian and Slovenian teachers proved to be statistically significant in all statements except one – “The low reputation of the teaching profession affects my satisfaction with work”. On average, teachers tend to agree with this statement (average rate for the entire sample was 3.74).

The entire sample mainly agrees that the teaching profession does not have a high reputation in the society ($M = 4.28$); Croatian teachers thereby achieved a higher statistically significant average rate than Slovenian ($M = 4.39$ $M = 4.13$). From the average score it is evident that teachers agree that they receive lower salaries than other equally demanding professions with the same level of education ($M = 4.23$). At this statement Croatian teachers achieved the highest average score and statistically significantly differ from Slovenian teachers ($M = 4.42$ $M = 3.97$), which is probably due to a worse economic situation in Croatia and lower average salaries of elementary school teachers. In this regard it should be noted that the Republic of Croatia considerably lags behind the EU averages and does not follow its recommendations in terms of the percentage of GDP which should be allocated for education and scientific research. The EU average for education is 4.5%, while the Croatian is 3.5%. According to data from the Institute for the Development of Education, Slovenia allocates 5.7% of its GDP for education, which puts it in the top 15 countries of the European Union when it comes to investing in education. Also, based on the main requirements, i.e. EU recommendations (2015) countries should provide at least 6% of their GDP for education, which has yet to be achieved in many countries. Among the factors that adversely affect the social position and status of the teaching profession are in particular low salaries of teachers and in this research we found that elementary school teachers share this view.

Slovenian teachers also achieve a significantly higher level of agreement regarding another statement on the Scale of low reputation when compared to Croatian teachers. Slovenian teachers largely agree with the statement that the media usually portrays teachers in a negative light ($M = 3.56$ $M = 3.44$). This raises the question of what teachers can do to improve their reputation in the society in terms of promoting their status and professionalism.

Concerning positive statements about the teaching reputation the entire sample of teachers largely agrees that the work of teachers is among the most important ones in the society ($M = 4.15$), which is in line with our expectations. Croatian teachers agree to a significantly higher degree with this statement than Slovenian teachers ($M = 4.25$ $M = 4.01$). Teachers agree to a somewhat lesser degree with the statement that the teaching profession provides a regular income and financial independence ($M = 3.32$) although the majority of teachers in the sample has an indefinite employment contract. There are also reported statistically significant differences between Croatian and Slovenian teachers, which in turn can probably be attributed to the weaker economic situation in Croatia. Croatian teachers believe to a lesser extent that the teaching profession provides regular income ($M = 3.10$ $M = 3.62$).

In the entire sample, the teachers least agree that parents respect teachers ($M = 2.66$) and that students respect teachers ($M = 2.91$). Again, there are significant differences between Croatian and Slovenian teachers. In both cases Slovenian teachers on average agree more that parents ($M = 2.71$ $M = 2.62$) and students ($M = 3.00$ $M = 2.85$) respect teachers. In this context we mention Verhoeven et al. (2006), who pointed out that a certain degree of responsibility for the societal reputation lies in the hands of teachers and that through their professional activity they can certainly contribute to achieving greater respect among their students and parents for their work and thereby contribute to shattering of the myth that the society has no respect for teachers.

Croatian teachers agree to a greater extent than Slovenian teachers with the fact that teaching is amongst the most important professions in the society, while, on the other hand, they evaluate to an even greater extent that teaching has a low reputation in the society and is less paid than other equally demanding professions. On the other hand, Croatian teachers agree to a lesser extent than Slovenian teachers that their occupation allows regular income and financial independence, as well as that their parents and students respect them. From the abovementioned it can be concluded that Croatian elementary school teachers feel that their profession has a lower standing in the society than Slovenian elementary school teachers.

Reputation of the teaching profession compared to other professions

We were interested to know how elementary school teachers rank the reputation of their profession compared to the reputation of other professions. We differentiated ten professions (preschool teacher, elementary school teacher, high school teacher, university professor, doctor, nurse, lawyer, entrepreneur, journalist, and stage actor) with regards to the degree of reputation. Both Croatian and Slovenian teachers on average ranked doctors the highest, however, the reputation of doctors in the Slovenian subsample has a significantly higher average ranking in comparison with the Croatian subsample of teachers ($M = 8.14$ $M = 7.85$). In the second place on the level of reputation are lawyers, both among Slovenian and Croatian teachers, and there are no major differences between them. It is surprising that entrepreneurs are ranked third on the scale of reputation among both, Croatian and Slovenian teachers, whereby this profession occupies a significantly higher average rank ($M = 7.07$ $M = 6.62$) on the Croatian subsample. The results may not be so surprising in an increasingly consumer-oriented society where a good

economic status and material goods rank high on the scale of values. According to estimates of elementary school teachers, the profession of a university professor ranks only fourth and occupies a somewhat better position among Slovenian teachers in relation to Croatian ($M = 6.45$ $M = 6.23$). Both Croatian and Slovenian teachers rank theater actors and journalists in the middle of the scale of reputation, whereby Slovenian teachers rank the journalists slightly better ($M = 5.26$ $M = 5.01$), which may even be surprising given that Slovenian teachers largely agree that the media usually show teachers in a negative light.

As it was expected, the following professions can be found in the bottom part of the scale: high school teacher, nurse, and elementary school teacher with the preschool teacher in the last place. It is interesting that Croatian teachers ranked the reputation of nurses higher than secondary school teachers ($M = 4.76$ $M = 4.55$), while the Slovenian teachers, contrary to this, on average ranked high school teachers higher than nurses ($M = 4.89$ $M = 4.00$). Due to this, there are statistically significant differences between the two subsamples. Croatian and Slovenian teachers ranked on average the reputation of preschool teachers the lowest, while they ranked their own profession second, with the occupation of elementary school teachers as having a slightly better average ranking in the Slovenian subsample compared to the Croatian subsample ($M = 3.94$ $M = 3, 61$).

Conclusion

In our study, we were interested to find out how the status of the teaching profession is perceived by the teachers themselves – they evaluated their agreement with some viewpoints regarding the prestige of the teaching profession in the society. In all statements connected to the reputation statistically significant differences were noticed between Croatian and Slovenian teachers, except in the statement “The low reputation of the teaching profession affects my satisfaction with work”. It can therefore be concluded that Croatian elementary school teachers perceive the profession as having a lower reputation in the society than their Slovenian colleagues.

We were curious to know how teachers evaluate their profession in comparison to other professions. As expected, the results show that Croatian and Slovenian teachers rank the occupation of doctors the highest, followed by lawyers and entrepreneurs in terms of the degree of reputation. The occupation of a university professor is ranked (only) fourth on the scale of reputation (the highest rank among teaching professions). At the bottom part of the scale of reputation both among Croatian and Slovenian teachers is the occupation of preschool teachers and elementary school teachers.

The results obtained in our study are confirmed by the results of other studies (e.g. Symeonidis, 2015), according to which the status of teachers varies depending on the education sector. The general perception of the professional status of teachers is “average” in all educational sectors except in higher education. A lower status is perceived more frequently in the field of early childhood, vocational training, and education of assistant teachers. Preschool teachers, teachers with vocational degrees, and additional teaching staff are associated with a lower professional status compared to other sectors, particularly higher education. It is known that women dominate the preschool and elementary school education and research has found

connections between the professional status and salary as well as the existence of a connection between the feminization of the teaching profession, low status, and reduced salaries. Our research shows that elementary school teachers themselves do not attach a high reputation even to higher education teachers, and ranked them on average on the fourth place among the ten professions.

It would be interesting to find out how others evaluate the work of teachers and their reputation. Imamović (2014) determined on a sample of Slovenian teachers that teachers rank themselves lower on the scale of importance of occupations than the parents of their students. It is worth to think about how teachers perceive their position in the society and the importance attributed to them. What is worrying is perhaps the fact that Croatian and Slovenian teachers in our study agree the least with the fact that they are respected by the students who are the first “users” of their knowledge.

One of the central and open questions that arises from all previously considered findings is the question of which measures could be used to possibly improve the status of teachers in the society.

In a recent report of the Education International Research Institute (EI) (Symeonidis, 2015, pp. 12-13) on how to improve the status of teachers and the teaching profession the following priorities in the creation of educational policy are emphasized: 1) improvement of salaries and working conditions which are seen as the most critical factors affecting the professional status and personal self-esteem of teachers, 2) provision of high quality teacher education, professional development opportunities, and promising career, 3) insurance of academic freedom, autonomy, and participation in decision-making, 4) advocating a strong system of public education in local communities, and 5) maintenance of a regular dialogue between educational associations and governments, and encouraging teachers to participate in public policy development.

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Prof. Dr. Jana Kalin, Faculty of Arts, University of Ljubljana, Slovenia,
jana.kalin@guest.arnes.si

Assist. Prof. Dr. Renata Čepić, Faculty of Teacher Education in Rijeka, University of Rijeka,
Croatia, renata.cepic@uniri.hr

Assoc. Prof. Dr. Barbara Šteh, Faculty of Arts, University of Ljubljana, Slovenia,
barbara.steh@guest.arnes.si

Bruno Leutwyler, Nikolay Popov & Charl Wolhuter

The Internationalization of Teacher Education: Different Contexts, Similar Challenges

Abstract

This is a comparative study focused on the internationalization of teacher education in three countries – Bulgaria, Switzerland, and South Africa. The authors stress on the fact that on the one hand, teacher education is exposed to the increasing imperative to internationalize but on the other hand, teacher education is traditionally to a very large extent nationally shaped. The classical fields of internationalization of teacher education – individual mobility of students and staff, program and provider mobility, internationalization of the curriculum, internationalization of the campus, international cooperation – are used as a basis for constructing the chapter. The authors present these fields in teacher education in Bulgaria, Switzerland, and South Africa. Then, comparing the three different national contexts, some common features, similarities and differences between the countries are analyzed. Finally, the study ends with synthesizing two main challenges that illustrate how an appropriate internationalization of teacher education is still to be developed.

Keywords: Bulgaria, Switzerland, South Africa, internationalization, teacher education, higher education, individual mobility, program mobility, curriculum, campus, international cooperation

Introduction

Even though higher education has always been international in the sense of a transboundary participation in creating and developing universal knowledge, the insistence on the imperative to internationalize higher education has increased drastically (e.g. Stier & Börjesson, 2010). The respective discourse is, meanwhile, omnipresent; and higher education institutions are requested to signpost explicitly their internationalization strategy. It seems as if internationalization had become an end in itself. In this sense, simple indicators for internationalization (such as the number of international students, the number of lecturers with an international track record) have entered higher education rankings and count, therefore, as indicators of quality (Brandenburg & Federkeil, 2007; Scott, 2009). This illustrates that internationalization has indeed become a key issue for higher education institutions. But, it illustrates as well a certain risk of assuming a logic of maximization: the more the better – internationalization as an end in itself.

This latter connotation represents a considerable challenge for teacher education. On the one hand, teacher education in academic contexts is exposed to the increasing imperative to internationalize and is prompted to find appropriate institutional answers. On the other hand, teacher education is conceived as an institutional process of reproducing *national* education systems and has, therefore, a locally oriented mission to qualify teachers for specific national contexts – for national contexts which are strongly locally governed. Therefore, teacher education

is traditionally to a very large extent nationally shaped. Its particular characteristics are influenced by complex configurations of historical, political, social, cultural and educational factors of the respective national context and focus always on own educational needs. Therefore, teacher education supplies a very locally anchored and regulated employment market and serves, in this sense, a very different need than the majority of higher education study programs in, for instance, finance, trade, industry, or technologies.

Between these poles of an increasing imperative for internationalization, on the one hand, and the traditionally strong anchorage in local contexts, on the other hand, teacher education is challenged to develop own ways of an appropriate internationalization. Against this background, the aim of this contribution is to illustrate different ways of developing an appropriate internationalization for teacher education in different contexts. By comparing the cases of Bulgaria, Switzerland and South Africa, it outlines how these different cases respond analogously to the global imperative for internationalization and where they develop different particularities. In doing so, it contributes to a better understanding of how different contexts understand the underlying notions of internationalization and how differently internationalization can be aligned with the nationally bound teacher education systems. In this regard, it takes up the growing evidence on the disparity of concepts, aims, and notions of internationalization in higher education (e.g. Stier, 2010; Stier & Börjesson, 2010; Maringe, Foskett & Woodfield, 2013) and specifies this disparity for the case of teacher education.

Furthermore, by illustrating different ways of developing an appropriate internationalization for teacher education, this contribution counterbalances the risk of assuming a logic of maximization and the connoted commercialism and commodification of international study programs. It rather asks what teacher education hopes to achieve through processes of internationalization and revisits the question of ‘why?’ (Deardorff, 2014, p. 35). Thereby, it turns the focus back to the question of what quality of internationalization can mean in teacher education.

In order to outline three different ways of internationalizing teacher education, this contribution draws on the well-established definition of Jane Knight, conceiving internationalization of higher education as “a process of change through integrating an international, intercultural and global dimension in the goals, functions and delivery of higher education. The suffix ‘isation’ denotes process and differs from an ‘ism’, which suggests an ideology. Thus it is inevitable that internationalisation will continue to evolve” (Knight, 2013, p. 81). Respective trends are sometimes discussed in the framework of the term “globalization of education”. Following Teichler (2007, p. 52), “internationalisation” refers to an increase of transnational, and, in this sense, transborder activities, whereas “globalisation” refers to the process of blurring or dissolving borders. Because the higher education landscapes are still strongly anchored in national regulations, frameworks and paradigms (Scott 2009), the term “internationalisation” seems more appropriate in this context.

In order to illustrate different ways of developing an appropriate internationalization for teacher education in different contexts, it is important to note that the internationalization of teacher education comprises much more than merely being a product or a facet of globalization. In the sense of Knight’s definition, internationalization means the integration of “international, intercultural and global

dimensions in the goals, functions and delivery” (see above) of teacher education. Therefore, the following parts describe how these core dimensions of internationalization are implemented in three different teacher education contexts. For this description, it considers the classical fields of internationalization (Knight, 2012a; Leutwyler, 2013):

- Individual mobility of students and staff: To what extent do students and staff have the opportunity to travel to foreign countries for education purposes and which aims are followed? How is individual mobility structurally embedded in teacher education programs?
- Program and provider mobility: To what extent does teacher education participate in the so called “second generation” of internationalization (Knight, 2014, p. 48)? What kind of twinning or franchise programs are offered? Do they offer any joint or double degrees with international partners? If so, which purposes are followed?
- Internationalization of the curriculum: How are international, intercultural and global dimensions represented in aims and objectives of teacher education study programs?
- Internationalization of the campus: To what extent are the teacher education institutions internationally or interculturally diverse? Is the student corps international or does it reflect the respective diversity of the national school system? To what extent do the lecturers have international experiences?
- International cooperation: What kind of international cooperation is institutionally embedded in teacher education and which aims are followed?

The following parts of this article describe these classical fields of internationalization in the teacher education systems of Bulgaria, Switzerland and South Africa. A subsequent comparison analyses similarities, analogies and differences in these three responses to the imperative for internationalization. A conclusion, finally, summarizes key findings of the comparison and outlines desiderata for the future internationalization of teacher education.

Internationalization of teacher education in three different contexts

Bulgaria

During most of the 19th Century, while being part of the Turkish Empire, Bulgaria did not have its own system of teacher education. Many Bulgarian teachers received their education in France, Germany, Austria, Switzerland, Russia, Greece. After the Liberation (1878) the newly established school system needed a lot of qualified teachers. As a result of that need the first Bulgarian university, today’s Sofia University, originated as a Higher Pedagogical Course in 1888 in Sofia and quickly developed into a modern European university. Teacher education has been part and parcel of the Bulgarian higher education system since its very beginning. The 1920s and 1930s saw strong German influence on education in Bulgaria. In the years of socialism (1944-1989), dominated by Soviet pedagogy, the internationalization was predominantly kept with other socialist countries. In 1989 the socialist regime collapsed and a new period of deep changes concerning all aspects of life began. Since then Bulgarian higher education and teacher education in particular have largely been opened to the world.

Individual mobility of students and staff

The total number of students in Bulgaria is 284'000, of which 273'000 are Bulgarian students and 11'000 are foreign students (NSI, 2014). Students enrolled in Bachelor and Master's Education programs are 7 to 8%, while PhD students in Education programs are 10% (ib.). About 24'000 Bulgarian students study at universities throughout Europe and the student mobility rate of Bulgaria is 9.0% (Eurostat, 2014). There is no reliable data on the number of Bulgarian students in other continents. According to non-official foreign sources, the total number of Bulgarian students abroad is now around 80'000 (EBBS, 2015).

Bulgarian students and academic staff have large opportunities to travel to foreign countries (mainly EU member states) for educational, research and qualification improvement purposes. Such opportunities are provided by the Ministry of Education and Science and EU exchange programs. The most used programs for student mobility are Erasmus, Erasmus plus, Grundtvig, Explore.

Program and provider mobility

Using Jane Knight's (Knight, 2012b, p. 4) classification of three generations of crossborder education – 1) Student mobility; 2) Program and provider mobility; 3) Education hubs – it can be said that the internationalization of teacher education in Bulgaria is at a very early stage of the second generation – Program and provider mobility. Some twinning Master programs are offered (for example, MA Program "Management of Education in English Language Teaching", jointly run by Sofia University and Amsterdam University). There are also some distance programs at both Bachelor and Master degree with English language instruction.

Internationalization of the curriculum

All Bachelor, Master and PhD Programs (both their curricula and disciplines' syllabuses), including all teacher education programs, are accredited by the National Assessment and Accreditation Agency at every 3, 4 or 5 years. One of the important criteria is how the given program corresponds to the relevant programs in other EU universities. This accreditation process permanently requires internationalization of curricula and syllabuses.

Student mobility, curriculum equalization and mutual degree recognition are supported by the European Credit Transfer System (ECTS). This system was introduced in 1999 by the Bologna Declaration, later on was extended to European Credit Transfer and Accumulation System with no change of the abbreviation ECTS.

Internationalization of the campus

There are no separate teacher education institutions in Bulgaria. Teacher education is integrated into the higher education system. Teacher education can be obtained at university faculties of education (this is the most often case) or at teacher colleges which are in some universities' structures (this is much seldom case). Study programs as Preschool and Primary School Education, Sport Education, General Pedagogy, Social Pedagogy, Social Work, and other programs as Social Sciences, Humanities, Natural Sciences, Technologies that prepare subject teachers – are predominantly national. Foreign students prefer to enroll in programs as Special Education, Speech Therapy, Fine Arts Education, Music Education.

There are two major minority groups in Bulgaria – Turks and Roma. While the Turkish minority is very well represented in teacher education programs, the enrolment of Roma students is insufficient.

It is difficult to estimate to what extent the lecturers have international experiences. It depends on the university, personal professional background, knowledge and skills.

International cooperation

The following types of international cooperation are institutionally embedded in teacher education:

- Establishing academic and research networks between Bulgarian and foreign universities;
- Attracting foreign lecturers, external reviewers of academic programs, and experts in international projects;
- Creating new forms of twinning and distance Master and PhD programs;
- Implementing ECTS into a larger and deeper scale;
- Harmonization of higher education legislation, teacher education curriculum and teaching practices with those of EU member states.

Nowadays, the internationalization of teacher education in Bulgaria mainly means Europeanization and particularly – European Unionization.

Switzerland

The Swiss teacher education landscape has undergone a far-reaching reform after the turn of the millennium. This reform, strongly in line with the Bologna framework, resulted in the virtual abolition of more than 150 teacher education seminaries (allocated at higher secondary level; ISCED-level 4) within only a few years and in the nationwide establishment of 15 Universities of Teacher Education up to 2005. Since then, these Universities of Teacher Education are part of the Swiss higher education system and award Bachelor degrees (for pre-primary and primary teacher study programmes) and Master degrees (for lower secondary teacher study programmes). However, the recent history has not yet allowed for a consolidated position of Universities of Teacher Education within the Swiss higher education system. The young Universities of Teacher Education are conceived as different from the traditional universities with their histories of up to 550 years. This can also be seen in the answers to the increasing imperative to internationalize: Swiss teacher education institutions feel still urged to legitimate their status as higher education institutions and use internationalization efforts for this purpose as well (Leutwyler, Mantel & Tremp, 2011). Nevertheless, they are commissioned with a very locally oriented mission to qualify teachers for specific national contexts (see above). The following paragraphs describe how Swiss Universities of Teacher Education deal with these conflicting priorities in the classical fields of internationalization.

Individual mobility of students and staff

Individual mobility is still the most prominent facet of internationalization in the Swiss teacher education landscape. International student mobility is considered as “the most important feature of internationalization of Swiss Universities of Teacher Education” (cohep, 2008, p. 4; translation by the authors). Accordingly, the Universities of Teacher Education promoted these activities; the number of students

participating in an international exchange increased incredible 57% in only three years between the academic years 2008/09 and 2011/12 (cohep, 2013), but remains still far below the share of traditional universities. In Swiss teacher education, the number of outgoing students outreaches the number of incomings by far (ib.). The impact of this individual mobility tends to be overestimated as some stable evidence suggests that not all participants can benefit (see for an overview Leutwyler, 2014). To make use of the potential of such exchange stays, the challenge is to develop a meaningful conceptual and curricular embedding of respective experiences. This challenge implies still a lot of open questions, but it is increasingly addressed by the majority of Swiss Universities of Teacher Education.

Program and provider mobility

This classical field of internationalization is hardly implemented in the Swiss teacher education landscape. Even though, on a global scale, this form of internationalization gains rapidly influence (Knight, 2012a), Swiss teacher education does hardly follow this global trend. This is because the employment market of teachers is largely locally bound. Furthermore, awarding certification as authorization to teach is still nationally regulated. Against this background, issues about brain drain or about an increasing commercialization of program and provider mobility are not under debate in the Swiss teacher education landscape.

Internationalization of the curriculum

In Swiss teacher education, an internationalization of the curriculum has a relatively strong history – even though respective approaches are not labelled as “internationalization”. Indeed, classical expressions of an internationalization – such as courses in Comparative or International Education – do not exist in Swiss teacher education institutions. However, Intercultural Education is well positioned in many Swiss Universities of Teacher Education; and ‘interculturality’ can be read as a pedagogical operationalization of internationalization (Leutwyler, Mantel & Tremp, 2011). Intercultural Education addresses, in this sense, the demands for teachers and schools for dealing productively with an internationalized society in a globalized world. This content-wise translation of internationalization focusses, on the one hand, on dealing with linguistic and cultural diversity in schools. On the other hand, it deals with the challenges of a globally interconnected world, including concepts such as Global Learning, Development Education or Education for Sustainable Development.

Internationalization of the campus

The approaches to make internationalization alive “at home”, on the universities’ own campuses, are not very developed yet in the Swiss teacher education landscape. A respective international or intercultural opening of the faculty or the student body is less pronounced than in other branches of the Swiss higher education system. So, not only the Swiss school system, but also the Swiss teacher education system suffers from a monolingual and monocultural habitus (Gogolin, 1994; Sieber & Bischoff, 2007): Whereas 8.3% of the Swiss teacher education students hold a foreign passport, the foreigners in traditional universities amount to 27.2% (FSO, 2011). Even though the status ‘foreigner’ does not describe sufficiently the linguistic and cultural diversity of the student body, the data

indicates that international and intercultural biographies in teacher education seem to be rather exceptions.

International cooperation

International cooperation is a very general facet of internationalization, including very different approaches, programmes and activities. On the one hand, Swiss Universities of Teacher Education participate in many international research networks and projects and, in doing so, legitimate their integration in the general higher education sector. These research cooperations range from small-scale projects to large-scale assessments (such as the OECD's PISA) whose Swiss parts are implemented by Universities of Teacher Education. However, both the participation rate and the success rate in competitive international funding schemes are clearly lower than those of the traditional universities. This might be read, once again, as a sign that Swiss Universities of Teacher Education are still less internationalized with regard to international cooperation.

On the other hand, the term 'international cooperation' is also expression of a paradigm shift from a classical 'development aid' to a more partner-like approach in so-called development cooperation (Mason, 2011). In this regard, an increasing number of funding schemes for scientific cooperation with partners in developing or transitional countries have emerged. One of these is eligible only for Universities of Teacher Education and focusses on Global Learning and Development Education specifically in Teacher Education (SBE, 2012). In this framework, nine Swiss Universities of Teacher Education have institutionalized so-called North-South partnerships with universities in the Global South and can apply for funding for specific activities with their partners. Respective activities contain the chance to tackle issues and train skills related to globalization, but also the risk of reproducing asymmetrical relationships, feeding unrealistic and non-productive ambitions on the part of the participants, and nourishing postcolonial dynamics (Leutwyler & Lauselet, 2016).

South Africa

South Africa occupies 1.2 million square kilometres (471'000 square miles) at the southernmost part of the African continent. The total population of the country is 54 million. Until 1994, the country had a system of racially segregated education, and was cut off from the international world by the international academic boycott (Harricombe & Lancaster, 1995). Both ended in 1994. A new Constitution based on the liberal Western European model was set in place. The new education policy was desegregation, and the international academic community welcomed South Africa once again.

Teachers were originally imported from Europe, mainly England and the Netherlands. During the nineteenth century, a normal school system of teacher education commenced in South Africa; and by the end of the nineteenth century, teacher education colleges came into being. During the twentieth century, the normal schools fell away and a system developed whereby primary school teachers were educated mainly at teacher training colleges and secondary school teachers mainly at universities. By the end of the twentieth century, the teacher colleges were closed, and universities are now tasked with the education of all teachers. There is

currently more or less equilibrium between teacher supply and demand. South Africa has a teacher corps of 410'000.

Individual mobility of students and staff

Since the academic boycott against South Africa has been lifted, a number of Education Faculties has commenced with projects of sending some student teachers for practice teaching abroad, i.e. to schools in countries in Europe, North America and elsewhere in Africa. However, these projects are very small, only a tiny number of students can participate, and in any case, it is only for spells of three weeks. The post-1990 internationalization of the student body of South African universities has not been impressive. In 2012, only 72'859, or 8.3%, of the 880'514 students at South African universities were international students (IEASA, 2014, p. 18). Moreover, 87% of these international students were from Africa (ib., p. 20). Hence, it was more a case of students from the north of South Africa flocked to South Africa (with its by far most developed higher education system in the Sub-Saharan African region), than internationalization in the truly global sense of the word. Staff did not internationalize forcibly either. According to the international CAP (Changing Academic Profession) survey of the academic profession, only 7% and 11% of the academic profession of South Africa got their first degrees and their doctorates from institutions outside South Africa (CAP project, 2013).

Program and provider mobility

While demand exceeds supply in South African higher education by far and although the South African gross higher education enrolment ratio of 17% is extremely low for an upper-middle income country, the private and off-shore campus sector is very, very poorly developed in South Africa. In 2011, 377'000 students in South Africa passed the terminal secondary school examination with grades high enough to qualify for university admission, yet universities could only take in 128'000 students (Cloete & Butler-Adams, 2012, p. 32). In other upper-middle income countries, such as Brazil, Mexico and Malaysia, this figure is typically around 40 percent. Less than 20'000 students attend private universities (Wolluter, 2011) and off-shore campuses on South African soil are limited to two Australian based universities (Bond & Monash) both fairly small with limited program offerings (mainly in the economic and management sciences), in which education is not included. Though the *Higher Education Act* makes possible the establishment of private universities and offshore campuses, the experience with a few “fly-by-night scams” resulted in government being hostile and setting up a bureaucracy making it devilishly difficult for foreign and private suppliers of universities to open operations in South Africa.

Internationalization of the curricula

In the pre-1994 era, South African teacher education programs at universities followed the (European) continental model, consisting subjects of the basic sub-disciplines of education, such as Philosophy of Education, History of Education, Sociology of Education, Comparative Education. These hooked onto the international corpus of knowledge in each of the fields, although, because of the academic boycott, curricula did not reflect much of post-1960 developments in each sub-discipline. After 1994, at the direction of the Ministry of Education, teacher education programs were redesigned, to train teachers for the following seven

specified roles of teachers: learning facilitator; interpreter and designer of learning programs and material; leader, administrator and manager; community, civil and pastoral role; learner and lifelong researcher; assessor; learning area/subject/phases specialist. These have little international currency, and certainly there are no edifices of scholarly knowledge for any of these to which any teacher program abroad is based upon, and this reform has strengthened the parochial nature of teacher education in South Africa.

Internationalization of the campus

The internationalization of the campus is constrained by the very factors constraining international mobility of staff and students, as outlined above. As far as the intercultural diversity of campuses is concerned, pre-1994 universities in South Africa were, as education at all levels, characterized by segregation, i.e. there were separate universities for students of various racial groups. While desegregation has been one of the cornerstones of post-1994 education policy, desegregation of universities (as desegregation at all levels) was very much a one-direction process, of more affluent and academically stronger Blacks to the campuses of the historically White universities, who now became integrated; while the historically Black universities still have a largely (90% plus) Black student corps.

International cooperation

When the doors to the international community reopened in 1994, and when the outside world and academic community took an interest in the South African project, MOUs (Memoranda of Understanding) were signed between South African universities and foreign universities. Unfortunately, many remained pieces of paper and did not result in many instances of practical cooperation.

Comparison of the different contexts

Having these different contexts in mind, some interesting patterns arise. Therefore, the following part compares the insights in the different contexts with regard to the units of analyses: the individual mobility of students and staff, program and provider mobility, internationalization of the curricula, internationalization of the campus, and international cooperation.

With regard to *individual mobility of students and staff*, comparable patterns arise. In all the mentioned contexts, individual mobility seems to be the cornerstone of internationalization in teacher education. Bulgaria's good embedding within the European mobility programs (such as Erasmus) facilitates the participation of students and staff, although a higher emphasis is led on outgoing than on incoming mobility. This is also the case in Switzerland, where the number of outgoing students outreaches the number of incomings by far. Interestingly, in South Africa, the situation is contrariwise: The general reputation of South Africa's higher education system attracts many regional students also in teacher education; incoming mobility has, therefore, a more important meaning than in the other mentioned contexts.

With regard to *program and provider mobility*, Bulgaria seems to be the only context in which this so-called second generation of internationalization (Knight, 2012b) is addressed in teacher education as well. Neither the Swiss nor the South African system has opened up the teacher education landscape for a supra-national

regulation of teacher licensing. Program and provider mobility, therefore, shows prototypically how teacher education is stronger locally anchored and nationally bound than other parts of higher education (such as economy or engineering).

With regard to the *internationalization of the curricula*, teacher education programs in all mentioned contexts express a form of embedding in international structures. In the Bulgarian case, accreditation checks a content-wise correspondence with relevant programs in other universities of the European Union. And the curriculum is structured along the guidelines of the European Credit Transfer and Accumulation System (ECTS). The latter aspect is valid for the Swiss system as well. The case of South Africa shows how the individual disciplines represented in teacher education programs are internationally oriented – as it is the self-conception of any scholarly discipline. Nevertheless, the redesign of teacher education to prepare for specified roles shows the strong national anchorage and influence – an influence that represents a certain tension with the generally global and international orientation of scholarly disciplines.

With regard to the *internationalization of the campus*, all the mentioned contexts exhibit a predominantly national orientation in teacher education. The campus internationalization in the sense of diversification benefits, if at all, from being embedded in bigger universities with more internationalized branches (in Bulgaria) or from general societal developments (in South Africa). Nevertheless, the tendentially monolingual and monocultural habitus of the teacher education units is clearly detectable in all mentioned contexts.

With regard to *international cooperation*, all the mentioned contexts show how teacher education has conceptualized itself as a scholarly endeavour, striving for possibilities for international cooperation and exchange. However, the Bulgarian example illustrates how international pressure may reduce the noble intentions of scholastic cooperation to a push towards harmonization. And the Swiss and the South African case illustrate the general attempts to internationalize teacher education which result in laudable activities – in activities which remain, nevertheless, below the level of other branches of higher education.

Conclusion

This contribution has shown how three cases, Bulgaria, Switzerland and South Africa, deal with the tension between an increasing imperative for internationalization, on the one hand, and the traditionally strong anchorage in local contexts, on the other hand. Although the contexts are different, the challenges for teacher education remain quite similar.

Firstly, teacher education has conceptualized itself as a scholarly endeavour and has benefitted, in this sense, from the embedding in traditional scholarly institutions. This embedding both claims and supports the efforts towards a comprehensive internationalization of teacher education. Nevertheless, the results of these efforts remain in teacher education below the level of most traditional parts of higher education. The challenges in this regard are twofold: On the one hand, teacher education is prompted to increase international activities of its students and staff as well as of its departments, institutions and curricula. On the other hand, teacher education is prompted to explain why ‘internationalization’ means something different to teacher education than to traditional scholarly disciplines and why,

therefore, expectations should differ in this regard. Teacher education may be a full-fledged part of the higher education system without following the same general, overarching imperative for internationalization. But the argument for this statement is still to be developed by teacher education institutions.

Secondly, teacher education is in all three cases largely nationally bound and supplies a very locally anchored and regulated employment market. This might explain the quasi ‘parochial nature’ of teacher education. However, such a strong national anchorage and influence contradicts the basically global and international orientation of scholarly disciplines. This contradiction results in the challenge for teacher education to maintain its scholarly autonomy and academic freedom on the one hand, and to consider, on the other hand, the specific developmental needs of particular professional communities.

These two challenges illustrate how an appropriate internationalization for teacher education is still to be developed, considering the poles of tension between higher education institutions and local regulations. Thereby, teacher education may benefit from its specific status: It does not have to follow blindly a ‘mainstream-internationalization’ with its trends towards the connoted commercialism and commodification of education (Deardorff, 2014). It can independently revisit the question of ‘why’ (ib.): Which aims and goals, which processes and activities of internationalization improve the quality of the core mission of teacher education? This is a great opportunity for teacher education. However, it has to address it actively and by its own.

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Prof. Dr. Bruno Leutwyler, University of Teacher Education Zug, Switzerland,
bruno.leutwyler@phzg.ch

Prof. Dr.habil. Nikolay Popov, Sofia University, Bulgaria, npopov@bces-conference.org

Prof. Dr. Charl Wolhuter, North-West University, South Africa, Charl.Wolhuter@nwu.ac.za

Part 3

Education Policy, Reforms & School Leadership

Gillian L. S. Hilton

Disappearing Teachers: An Exploration of a Variety of Views as to the Causes of the Problems Affecting Teacher Recruitment and Retention in England

Abstract

This paper discusses the causes of the difficulties experienced in recruiting and retaining teachers to work in schools in England. The analysis begins with a report by the National Audit Office which blamed the Department of Education's actions as the main reason for the difficulties, then using other documented sources, reports, press articles, parliamentary committee information and news channels the paper explores the problem from a wider perspective. Despite the criticism of the Department for Education it appears that though its actions have exacerbated the problem and it has been slow to acknowledge that we are facing a crisis, the main concern it appears is the tremendous work load faced by teachers in England. This, combined with other concerns is not only making teachers think seriously about leaving the profession, but also preventing potential recruits applying to train.

Keywords: teacher training routes, teacher recruitment, financing teacher training, teaching profession

Introduction

In 2016 the National Audit Office (NAO, 2016) severely criticised the Department for Education (DfE) in its *Training New Teachers* Report, claiming that the multitude of routes into teaching, recently established by the DfE, is causing so much confusion amongst possible recruits that they are reluctant to apply to become teachers. This complaint had also been voiced by The University Council for the Education of Teachers (UCET) whose director pointed to the overlap between the training routes offered and the confusion caused by the National College for Teaching and Learning (NCTL) saying that it could be possible for recruits to change between programmes during training (Morrison, 2015). Certainly there is a problem in the recruitment and retention of teachers in England at present, a situation only just beginning to be acknowledged by the DfE, who were condemned by the NAO (NAO, 2016, no page) claiming, Ministers have a 'weak understanding of local teacher shortages'. The report claimed that the DfE appears to take a national view on teacher supply, rather than examining local problems. There were also further concerns about the massive rise in the numbers of providers entering the

field, as the DfE had not seemed to consider the increased cost of inspecting all those now engaged in teacher training. The NAO's conclusion was that the seven hundred million pounds spent yearly on recruiting and training teachers is not providing value for money.

Certainly there are recruitment and retention problems. Dickens (2016) reports that the shortage of teachers is increasing, as for four years, recruitment targets have been missed. Vacancies increased from 350 (0.1 per cent of the workforce) in 2011 to 3,210 (0.9 per cent) in 2014, though these figures are collected in November when vacancies are generally at their lowest. Burns (2016) points out that 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. To add to this problem government's action to cut funding for some programmes such as the new School Direct route, has seriously concerned schools and affected potential recruitment as training salaries have been cut. As many of the School Direct applicants are already employed in schools as Learning Support Assistants, they cannot train without a salary. The NAO (2016) continued its criticism of the DfE, questioning the judgements made about the numbers of training places required, as data was flawed and supply models used by the DfE were internal and had not been justified by the scrutiny of exterior review. Further concerns were expressed with regard to the lack of training places in areas of greatest need, for example the east of England, where an increasing rise in immigration from the EU had put tremendous pressure on school places.

Training place provision

The routes to becoming a teacher in England are many and varied including the most popular the Post Graduate Certificate of Education (PGCE), taken for one academic year after a subject degree, with an intense period of theory at the start of the training then practice in at least two different schools, increasing in amount as the year progresses. This route is for secondary, primary and early years teachers and is run in Higher Education Institutions (HEIs). The undergraduate route which qualifies students for a degree and qualified teacher status (QTS) (3 to 4 years in total) is also offered by HEIs and is popular with those training for primary and early years as it gives more subject input and a chance to specialize in maths, English or science and increases practice time in schools each year. Though the above are in many ways school based, the greatest number of trainees however, are now trained in schools on 'so-called' school-based routes, via the one year School Direct routes (paid and unpaid) run by groups of schools, with a lead school or by a School Centred Initial Teacher Training organization (SCITT) or via a PGCE run by a SCITT, with support from an HEI or through the Teach First Route. This latter, a two year programme for graduates with good degrees from top ranked universities, who undertake six weeks initial training then go straight into the classroom and qualify as teachers after two years. When qualified, the Teach First trainees can leave to follow another career or can expect rapid promotion to leadership.

In addition there are programmes for teachers of pre-school children (EYITT), for those who wish to work in secondary schools and further education colleges (QTLS), those wishing to teach English as a foreign language, for Doctoral students

who wish to undertake teaching and researching in schools, for troops who wish to become teachers and a primary physical education specialist route, plus a pilot programme for special needs teachers. The latest suggestion is for those who are concerned about the high cost of a university programme to be given the chance to follow a graduate apprenticeship scheme for four years based in schools after the trainee completes Advanced Level examinations at the end of schooling. This route would pay a small salary and combine degree level study and qualified teacher status whilst working in a school (Ward, 2016a). It is clear to see that with all this choice applicants might be confused about which programme to choose but the question must be asked, is this the only cause of the recruitment problem?

Other concerns affecting recruitment and retention

Reports from the press and government bodies point to a variety of problems which affect recruitment and retention of teachers in England.

Subject shortages

For years, there have been shortages in secondary specific subject areas such as maths, computer studies, and sciences particularly chemistry and physics, despite the government offering bursaries to prospective recruits in shortage subject areas. Now however it appears that other subjects are joining this group, for example, design and technology, modern foreign languages and business studies. The efficacy of the provision of financial incentives to highly qualified graduates to train for teaching has also been questioned by the NAO Report, which claims the DfE has no clear evidence that these financial incentives have any effect on recruitment. In maths the shortage problem has become acute, with schools reporting that many students are taught by non-maths specialists, so severe is the shortage of fully qualified maths teachers (Wiggins et al., 2016; Roberts & Foster, 2016). The main reason for this appears to be related to the fact that good maths graduates can demand salaries from business or financial institutions at a much higher rate than is offered to teachers (Ward, 2016b). Vaughan (2016) reports that head teachers are increasingly complaining about the quality of the teachers they are forced to appoint in order to staff their schools and that they are having to cut non-core subjects from the curriculum and/or increase class sizes in order to provide sufficient teachers for their rising school rolls.

Salaries

The curtailment of salary increases for teachers after the 2008 financial crash is affecting numbers of prospective trainees, as public sector salaries have been pegged at a 1% annual increase (Busby, 2016a). Coupled with this is the introduction of performance related pay, which has resulted in some teachers receiving no salary rise at all. In the private sector incomes have been rising at a rate of about 2% making teaching far less attractive as a career than it was previously, as teaching is an occupation seen as stressful and low in status (Coughlan, 2013). Ward (2016c) reports that students with good A Level grades are not considering teaching as a possible career, as other jobs are better paid and far less stressful.

Mistakes by government agencies

Despite the DfE's attempts to encourage more people into teaching, mistakes have been made, for example, misleading adverts on national television appearing to promise a starting salary of thirty thousand pounds for new teachers, when this incentive is only available to highly qualified physics graduates. It is possible that this much criticised advert has led to potential trainees perceiving the DfE's information as lacking credibility. Targets for recruitment are not being met and constant changes by the DfE in controlling training places available, even during the middle of recruitment periods, has caused confusion and consternation to providers, who also complain about the amount of paperwork required. The NCTL's actions in the 2015/16 recruitment phase were described as creating a 'free for all' (Ward, 2015, p. 18) as allocations to places were removed and a first past the post system installed mid-year. This resulted in all providers scrambling to interview and offer places as soon as possible, before the NCTL and DfE decided to prevent further recruitment. This resulted in some recruits being told that despite their being offered an interview; providers had been told to stop recruiting.

Increasing costs of the training routes

As a result of the DfE's widening of training routes the costs of training a teacher is rising. The most expensive route (£70,000 per trainee) is Teach First which is intended to either quickly project trainees into positions of leadership but also allowing them, after their two years to leave teaching and follow another career. As a result, this programme has the highest drop-out rate of all the routes into teaching (Allen et al., 2014). Further to this is the problem of the attempt by the DfE to recruit teachers from overseas (Stewart, 2015) and also train returning troops to be teachers. These initiatives have also been costly, particularly as they have failed to bring in the projected numbers of new teachers. Richardson (2016) points to the expectations as opposed to the reality, as after two years the troops' scheme had only produced twenty eight new teachers and the drop-out rate from training has been very high. The scheme which offered a degree and qualified teacher status in two years has been condemned by unions as many of these recruits lack the required subject knowledge and success in the military does not mean that becoming a good teacher is assured. As for the overseas recruitment staff arrive, but having experienced English schools, many either quickly return home, or convert to supply teaching where the demands are less. The causes for this failure to remain in the job appear to be the massive demands by government on teachers in England and the poor behaviour and attitude of many children (Busby, 2016b).

Teacher retention

Scott (2016) reported that the present leaving rate from teaching is at its highest for ten years, 9.5% of staff left in 2016. Rustin (2016) reports that one of the main teacher unions Association of Teachers and Lecturers (ATL) has claimed that the role of a teacher prevents people leading normal lives and also noted the claim by the Chief Inspector of Ofsted that two thirds of recruits leave the profession during the first five years of their service, a disastrous loss to the profession professionally and economically. Additionally Santry (2016) and Ward (2016d) have reported that experienced teachers are leaving the profession in an attempt to lead less stressful lives and stepping down to become private tutors, Learning Support Assistants in

another teacher's classroom, or cover supervisors where the weight of responsibility and accountability were far less. Also she noted the numbers of teachers now retiring early, as they no longer felt able to cope with the expectations of government and inspectors. Many of those who leave either during training or after working in the schools go on to work in the education sector and often, as reported by The National Foundation for Educational Research (NFER), initially take a reduction in salary (Worth et al., 2015). In addition, a greater number of teachers than previously are now seeking work overseas in international schools, where pay is higher and the stress and demands on staff far less acute (Barker, 2016). Rustin's (2016) research on the reasons for leaving the profession raised the areas of the constant changes made by governments to the curriculum, the assessment process and the teachers' lack of control over their own work, coupled with the stultifying form filling and report writing all resulting in stress and a feeling of being exploited.

Teachers leaving the profession due to overwork

A report by ATL (Lee-Potter, 2016) claimed that four out of ten teachers leave the job within a year of studying to become a teacher. The causes were many but centre on poor behaviour in classrooms and the amount of time spent planning, justifying the choice of teaching method employed and the insistence on detailed reflections on every lesson taught which proved to be too much work for many trainees. An ex teacher claimed that teachers are overworked, undervalued and underpaid (Lee-Potter, 2016). Marsh (2016) claims that teachers enter the profession for a variety of reasons but mainly, according to a recent survey, to make a difference to the lives of the children (92%). Many however, are quickly disillusioned, with poor pay and bad behaviour being high on the list of complaints about the job. The workload issue however, seems to have come to the fore, as why so many teachers leave. Despite promises made by government to look into the problem, little has been done and the constant changes to the curriculum, assessment processes and demands for constant data gathering are making the job of a teacher impossible and unattractive. Woodcock (2016) suggested that Ofsted should look at teacher turnover figures when making judgements on a school's success levels. *The Times* article also reported that one of the groups examining teacher retention has suggested that schools should be held accountable for the well-being of their staff. However, as recently head teachers too are now leaving the profession early and good heads are becoming increasingly difficult to find this suggestion seems non-viable.

Conclusion

It is clear from the above that despite claims that the myriad routes into teaching are the main cause of a lack of recruits, that the problem is far more complicated. It is however, obvious that the profession is becoming far less attractive to potential recruits. It has taken a long time for the government to acknowledge and address this problem and it has certainly not solved the subject of teacher workload, which is central to many of the problems noted above. However, the lack of status of the profession, the micro-management by government of everything that happens in schools, lack of communication between government departments, coupled with the lack of trust of teachers; constant inspection and a loss of professionalism and the

low pay in comparison with other jobs are adding to the crisis. At present with rising school roles due to migration and an increasing birth rate, recruiting teachers is projected to become even more difficult in future. Nothing but better pay, more autonomy and less interference from government and a greater trust of teachers is needed, but this can only occur over the long term. The future for education of English children does not look promising, with larger classes, less well qualified teachers, shortages of staff in many subject areas and a lack of those wishing to take on management roles. Urgent government action of the right kind is needed but whether there is the will or the ability in government is at present in doubt.

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Dr. Gillian L. S. Hilton, Middlesex University London, UK, gillianshilton@gmail.com

Gillian L. S. Hilton

Government Policy in England on the Financing of ITT: Value for Money or a Waste of Resources?

Abstract

A recent report by the National Audit Office (NAO, 2016) has criticised the Department of Education's organisation of Initial Teacher Training programmes in England as not providing value for money. This paper explores recent reports from government agencies, Parliament and the press on this issue. Further to this, leaders of various programmes for teacher training, including those run by a university, a School Centred Teacher Training organisation and a lead school in an Academy consortium, between them providing a wide variety of programmes, were questioned on the recent actions of the Department for Education and the National College for Teaching and Leadership with regard to how their actions have affected providing programmes for prospective teachers. The paper concludes that the NAO's claim that the DfE is not providing value for money is correct and that in order to prevent further wastage a more measured and coherent approach to teacher training in England is required.

Keywords: financing teacher training, organising teacher training, training effective teachers

Introduction

Hanushek and Rivkin (2006) question why so little research has occurred on what costs are entailed in training new teachers. There has been a great deal of discussion in England and in the USA about the varying effectiveness and quality of teachers produced by the different routes into the profession (Decker et al., 2004; Boyd et al., 2005; Kane et al., 2008; Allen et al., 2014), and yet there is no systematic comparison of the costs associated with each training type. Teacher training programmes in England have for the last four years, failed to recruit to the target set by the Department for Education (DfE) and controlled by the National College for Teaching and Leadership (NCTL) (NAO, 2016). Roberts and Foster (2016) in a House of Commons Briefing Paper record that in the year 2015-2016 for the first time, more than half the post graduate Initial Teacher Training (ITT) programmes (51%) were based in school as opposed to university. There has been a massive increase in ITT providers of school-centred routes, up from 56 in 2011/12 to 155 in 2015/16. These authors raise the point that this has resulted in university staff feeling 'that their training expertise is being side-lined and that the changes risk creating imbalances in the supply and demand for teacher training places' (Roberts & Foster, 2016, p. 3). Further to this has been the refusal of the DfE, (at the end of 2016) to issue information on how the ITT places had been allocated for 2017. This has caused anger and resulted in The University Council for the Education of Teachers (UCET) to question why the national figures have not been published, as individual providers have known their own numbers since September 2016. In previous years the national allocations were available in October. UCET chair,

Nobel Rogers accused the government of covering the specific recruitment figures in a 'veil of secrecy' (Ward, 2016, no page).

The move to the domination of school-centred programmes had come about as a result of the introduction of School Direct (SD) programmes after 2010, rising from the belief by the then Secretary of State for Education that teaching is best learned at the feet of a master, not from theoretical input from university staff (TES, 2010). However, SD has not recruited to target and the whole training process is further complicated by the tremendous rise in providers of ITT programmes, resulting from the change from university based to school centred programmes. The inspection of those programmes is a cause for concern, as it is resulting in ever increasing costs. Since 2010 there have been significant changes in ITT programme provision with a marked increase in numbers of trainees following the Teach First (TF) route, initially in secondary schools, followed by an expansion into the primary sector. In these programmes top graduates from 'good' universities are given intensive six week preparation programmes, then put into schools in 'difficult' areas and supported for two years while they work to gain qualified teacher status. After this service they can move to other careers or may expect rapid promotion in schools.

Funding as a result of these changes has been targeted towards programmes where schools are at the forefront. In addition, more financial support was targeted at specific shortage subject areas such as secondary physics, computing and maths which has also been strongly criticised by NAO (2016), as there is no independent evidence that these payments actually result in trainees being recruited and then taking up teaching jobs after qualifying. These concerns are set against the knowledge that school budgets are reducing and pupil numbers rising. An answer to a parliamentary question revealed that more than one thousand Local Authority schools and one hundred Academy Trusts are in debt and head teachers have to spend large amounts of money, that they cannot afford, in attempts to attract staff (Coughlan, 2016).

The main routes provided for potential trainees are, School Direct (SD) (salaried and unsalaried), Teach First (TF salaried), School-centred initial teacher training (SCITT) offering PGCE and/or SD routes, consortia of schools led by a lead teaching school offering SD and TF, Higher Education Institutions (HEI) offering the Postgraduate Certificate in Education (PGCE), SD and Bachelor degrees (BEd/BA) and SD.

A rising tide of criticism directed at the DfE and NCTL was targeted at the costs of financing the constant changes and the confusion the repeated interference of these two bodies was creating for providers of ITT. The DfE (2015) produced the following figures: new trainees in 2015/16 in England, 28,148 to post graduate programmes, including TF numbers (included in the overall figures for the first time). This is a rise from the academic year 2014/15. There were also 5,440 undergraduates, compared with 5,936 in the academic year 2014 to 2015. The cost of training new teachers for English schools was estimated by DfE at £700 million per annum. Despite this expenditure, vacancies are rising and schools finding it difficult to appoint and retain teachers with a rising tide of resignations from the profession. The year 2015/16 saw 6% of training places for post graduates unfilled, with specific areas of real problems, for example a 29% shortfall of trainee physics teachers. The recruitment round for 2016/17 has shown an overall reduction of two

percent in those beginning training programmes. Although primary recruited to target, there were fewer applications and take up of secondary subject places in a wide range of subjects, including those part of the English Baccalaureate (EBacc) subjects, down five per cent and considerably more in the non EBacc subject areas (George, 2016).

Costs of ITT routes and benefits to schools

A report by the Institute of Fiscal Studies (IFS) on ITT costs (Allen et al., 2014) pointed to the great variance in the costs of training around 20,000 new teachers annually, related to the different routes offered. Costings arise from ‘a combination of student finance (tuition fees and maintenance loans and maintenance grants) and direct grant funding’ (Allen et al., 2014, p. 1). These vary in different parts of the country and the subject and degree classification of the trainee. The IFS claimed that the 2014 report was the first evidence presented as to the cost effectiveness of the different routes into teaching and that no particular route attracted the ‘best’ most effective candidates. The average cost to government at the time of the IFS report for providing this student finance was large (between £13,000 and £18,000 per trainee for postgraduate ITT and between £10,000 and £27,000 for undergraduate ITT) (Allen et al., 2014, p. 2). Student loan finance is available for tuition fees and living costs to be repaid with interest, whilst working (DfE, 2016). However, the majority of teachers will never pay off the loans (undergraduate and post graduate) before they are written off (Allen et al., 2014). Non-salaried routes cost less than those paying a salary as for some trainees, the school contributes to the earnings of the trainee and student loans are not available for salaried trainees. TF is the most expensive route into teaching and the one with the highest drop-out rate as only two years; service is demanded. Reform, a right wing think tank claims that TF provides 7% of new secondary teachers but consumes 11% of training costs (Hazell, 2017). In addition for all routes, there is the cost of staff time to mentor, support, observe and provide feedback to trainees. This is calculated at around eighty to one hundred pounds weekly for each trainee in term time.

An initiative introduced by the government as a pilot project at the beginning of 2016 the *National Teaching Service* (GOV.UK, 2016), attempted to recruit one hundred teachers and middle leaders to volunteer to work in schools in difficult areas, where recruitment was a problem, with the intention of recruiting one thousand teachers. The only incentive offered was removal expenses. The launch cost the NCTL a considerable amount money but only twenty four teachers volunteered to join the initiative and as a result the pilot was cancelled in December of the same year (Kirk, 2016); another demonstration of the ineffective leadership offered by the DfE and NCTL.

Continuing Professional Development (CPD)

The Institute for Public Policy Research IPPR criticised poor and sporadic CPD offered to teachers in many English schools, often unsupported by theoretical evidence of its efficacy (Lightfoot, 2016). Annually around one billion pounds is spent on developing teachers after their initial training, but the IPPR report claims that CPD offered to teachers does not appear to improve the quality of their work (Hood, 2016). IPPR also pointed to the ‘one-off’ nature of CPD, rather than a

developing programme and that provision is not based on well tested research theories. As a result, there is little improvement in teacher quality five years after training has ended. Good consistent CPD aids teachers in developing and becoming experts, who can support colleagues to reach similar goals (Hood, 2016).

Research

In order to discover the effects of the changes made to ITT by the DfE and NCTL, leaders of various ITT programmes were questioned on their experiences in recent years of working with these two bodies and the consequences of the changes to their programmes. The respondents included an Education School Leader at a university, a PGCE SCITT leader, a SCITT primary SD leader and representatives of about twenty schools involved with School Direct and Teach First Programmes. The programmes run by these groups were varied; PGCE (primary, secondary and early years) and SD run by the university and the SCITT and undergraduate programmes at the university. The schools involved in the research were also involved with PGCEs plus SD, TF and some were closely involved with universities or the SCITT for support on theoretical training and assessment of trainees' performances. However, some schools in large academy chains undertook all the school led training (SD, salaried and unsalaried) alone, believing they had sufficient expertise to provide all that was required to train new teachers, though many admitted they had not had much previous experience in this role. Some consortium lead schools had attempted to become SCITTS themselves, seeing this as another source of income. However, in the year 2015/16 funding for SCITTs had been cut and they were finding it difficult to manage their expenses, let alone make money, which had been their expectation.

The greatest changes had occurred in university education departments NCTL cutting numbers on PGCE programmes. This resulted, in one university, being forced to close three successful programmes for secondary subjects, one for a shortage area and the department being forced to agree to accept SD numbers to make up for these financial losses. SD is not as well financed as the previous graduate and registered teacher programmes which it replaced. Finance for undergraduate programmes had also been cut and early years numbers withdrawn for one year and restored in the following year. This caused great difficulty with staffing provision, as did reduction in allotted numbers in various secondary subjects. The university SD route included twenty full days of theory training, (professional and subject knowledge) and recently more schools had asked to be used by the university for placing SD trainees, moving from other providers or their own schemes. The university leader said it was impossible to compare quality of provision, as the programmes were so varied, with some including very little theoretical input. The leader expressed concerns that she had discovered through UCET that due to poor guidance from DfE, schools had been taking on salaried SD trainees without the requisite three years' experience, putting them straight into classrooms on their own and paying them as part timers. She believed this was due to the cuts in funding for SD salaries. This had resulted in DfE re-writing instructions to say that all SD paid trainees must be full time.

The SCITT had lost income due to NCTL cuts to the SD budget and one school and its satellite schools starting to train teachers themselves. When asked if they

were managing to cope, the response from the SCITT was ‘it is a constant struggle to provide a high quality programme on a decreasing budget we have lost thousands of pounds of income’. The respondent said that the SCITT was still financially viable but ‘only just’, due to the enormous competition from neighbouring lead schools providing their own training. They had no links with universities and all their training money was kept and used in-house. The SCITT however, had to charge schools for their input on theory, lesson observation, mentor training and assessment of trainees. However, the lead schools had also suffered from the vacillations of DfE and NCTL with trainee numbers being capped, then uncapped, numbers cut and payments reduced for salaried trainees, meaning the schools had to find more money to provide salaries for trainees.

A series of emails seen by the researcher, at the beginning of the recruitment drive for 2017 entry, castigated NCTL and clearly demonstrated the frustration of many schools and the SCITT, who were being instructed by NCTL to post their vacancies on the area of the University and College Admission Service (UCAS) website allotted to teacher training, before any providers had been allocated numbers. There was a total breakdown in communication between the main players in the recruitment process, causing anger and despair to those in schools attempting to attract new recruits.

The SCITT leader described the interference by the DfE/NCTL in the previous year’s recruitment round as ‘a fiasco’ as the normal method of bidding for training place numbers occurred; numbers granted, but then mid-year all providers were told to recruit as many trainees as they could without restriction, until told to stop by NCTL. All programme leaders considered this intervention as a disaster as it caused ‘a mad scramble to recruit as many as we could meaning we took on candidates who at other times we might have rejected, believing that better ones often come along at the end of the recruiting period’ (SD SCITT primary programme leader). This led to the SCITT being accused of inefficiency by prospective trainees who because of this action, had interview offers withdrawn. The SCITT leader spoke of the problems of dealing with the constant changes in the recruitment process caused by the ever-changing instructions received from DfE and NCTL.

When asked how the system could be improved and provide better value for money, the primary SCITT School Direct leader requested a return to former funding patterns with the SCITT being allocated funding to use with schools, rather than NCTL funding schools, who then could decide whether or not to use some training services of a university or a SCITT. This respondent thought, to retain high quality training there needed to be a concentration of funding on providers who offered it, rather than money being given to providers whose quality had, in some cases, not been proven. The university leader complained about the wording of the compliance documents Ofsted used to judge standards as they appeared to be written by ‘people at DfE who knew little or nothing about ITT’. Also, the DfE website no longer contains pages of advice for providers who are still waiting to find out the national picture for training place allocations, which the university leader believed was caused by to the ‘failure of the centres of excellence initiative’ where some chosen but unnamed providers had controversially been allotted three year numbers allocations.

Several respondents wanted more support from DfE/NCTL for CPD provision and funding Masters Degrees and expressed concern over the in-house efforts of some lead schools to provide all the CPD for their staff with little or no input from universities where education research is undertaken.

Conclusion

It is clear from the findings that all is not well in the relationship between the DfE, NCTL and training providers. As the critics of the ITT system point out, the high costs are not providing value for money and the needed trainees are not coming forward, nor is CPD being effective in improving teaching and learning. It is time that DfE, NCTL and education professionals, together with government agencies looked in detail at the evidence as to the cost effectiveness of the diverse and multi-faceted routes into teaching and the performance of these in providing the nations' new teachers and evaluate the effectiveness of the leadership of DfE and NCTL so as to improve effectiveness and a sensible use of scarce resources.

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Dr. Gillian L. S. Hilton, Middlesex University, London UK, gillianshilton@gmail.com

Nicholas Sun-keung Pang & Zhuang Miao

The Roles of Teacher Leadership in Shanghai Education Success

Abstract

Teacher leadership is generally accepted as having a critical role in supporting school improvement. However, most knowledge on teacher leadership comes from the West, the roles of teacher leadership in the East, particularly, the most populated country, China, remain largely unexplored. Shanghai students were ranked top in PISA 2009 and PISA 2012 and these successful experiences have set examples to the world. This paper aims to report why and how Shanghai schools have been successful from the perspective of teacher leadership. A qualitative study to explore the roles of teacher leadership in six Shanghai schools was conducted. The findings confirmed the critical contribution of teacher leadership with three specific roles of teacher leadership emerging from leadership practices to support school improvement. The findings from this study may contribute to the literature on how teacher leadership sustains school improvement.

Keywords: teacher leadership, school improvement, Shanghai, PISA

Introduction

In the era of globalization, the pressure on schools and educational systems to achieve excellence is greater than before (Pang & Wang, 2016). However, the onus to achieve excellence in school education is no longer the responsibility of the school principal but calls for concerted efforts by all individuals who have been involved in driving the missions of education (Murphy, 2005). One obvious reason of emphasizing teachers' leadership and collaboration is that teaching has been the core of school improvement and success (York-Barr & Duke, 2004). Teachers are more closely connected to student learning with front line contacts than principals. Many research studies indicate that principals' leadership is the second most influential school-level factor that determines student learning achievement, right after the influence of teachers (Grissom, Kalogrides & Loeb, 2015). In that sense, teachers who have excellent skills in pedagogy and who have strong willingness to help other teachers are critical for school success. These teachers may offer alternative leadership forces in addition to the principal's leadership.

The concept of teacher leadership

Teacher leadership is now considered to be the catalyst of education reform. Many education systems have recognized the key contributions of teacher leaders and their positive influence on school improvement. This challenges the traditional pyramid power structure of principal leadership. Starting in America, in the 1980s teacher leaders and the concept of teacher leadership has become a core research focus and practice in educational leadership (York-Barr & Duke, 2004).

A universally accepted definition of teacher leadership has been absent in the literature (Murphy, 2005; York-Barr & Duke, 2004). Teacher leadership is defined in different contexts and teacher leaders' roles and functions vary from school to school. It implies that the concept of teacher leadership needs further verification and empirical investigations. York-Barr and Duke's (2004) comprehensive review on teacher leadership has shed light on the understanding of the concept. One of York-Barr and Duke's major contributions to this area is that they re-define teacher leadership based on their comprehensive review of literature. Adapting from York-Barr and Duke's (2004) definition of teacher leadership and considering the tradition and characteristics of Chinese schools and educational context, the definition of teacher leadership in this study is defined as: '*Teacher leadership is a collaborative process which is initiated, organized, and led by teachers with the exclusive purpose to improve teaching practice and learning outcomes through involving all other teachers and stakeholders*'.

Education reforms in China

In June 2001, the Guideline of Compulsive Education Curriculum Reform (pilot version) (MoE, 2001) was formally approved by the State. Not only did the reform aim to address the problems in the national curriculum but also led to a systematic transformation of teaching and learning (Jin & Yin, 2008). Teachers, who were at the heart of the reform, were requested to change from the roles of knowledge transmitters to facilitators and advisors of student learning.

About nine years later, the Ministry of Education (2010) in China released the Long-and-Middle-Term Planning of National Education Reform and Development (2010-2020) (The Plan). In which, teachers have been once again required to continuously improve their capacities and competences of teaching in order to fulfil higher expectations from stakeholders in the twenty-first century (Gu, 2009). 'Backbone teachers', who are officially recognized teacher leaders in the Chinese context, have been stressed many times in the Plan. They should be promoted and should be shaped as teacher leaders who are experts in teaching and research (Zhang & Pang, 2016a).

More recently, another education reform document, 'The 13th Five-Year Plan of National and Educational Development', was released (MoE, 2017). Specifically, the plan acknowledges a global megatrend in education which focuses inclusive, equitable and quality education as the future goal for Chinese education (MoE, 2017, Chapter 1). A highlighted approach in the reform is to enhance teacher quality, and to nurture teacher leaders who would lead the changes in classroom practices and who are transformers of student learning (Zhang & Pang, 2016b). Backbone teachers, subject leaders, teaching experts, excellent teachers would be identified as the key personnel who can promote the quality of teaching and learning (MoE, 2017, Chapter 8). These teachers are expected to be exemplars to other teachers and expected to lead the changes of curriculum, teaching and assessment within classrooms. Most important, these teacher leaders would serve as mentors to young and junior teachers and help them to develop further.

To summarise, since the education reform in 2001, the State has been changing the paradigm of school reform from examination-oriented education to quality-oriented education. The existing focus of the reform is to nurture teacher leadership

and it is highly recognized that teacher leaders are ones who are expected to be the key players to bring about successful educational transformation in terms of innovative ideas and practices. In this context, educational reforms in China are therefore fertile grounds for teacher leadership as well as school-based research which together lead to extensive educational transformation and school improvement. As an independent municipality in China, Shanghai has always been a leading field in education reform and Shanghai schools have been very successful in educational transformation under the national education policies (Zhang & Pang, 2016a).

PISA and Shanghai

Shanghai began the journey of the Programme for International Student Assessment (PISA) in 2009, as representative of China. Out of 65 countries and districts, Shanghai students led OECD average scores by a large margin, were ranked number one on all three subjects, reading, math, and science (OECD, 2010). When compared to the high performing OECD countries, say, Korea and Finland, Shanghai still outperformed them by a significant margin. In 2012 PISA, Shanghai students not only kept their first position on all three subjects, more importantly, they improved their achievements greatly while the average scores of all participating countries and districts remain unchanged (OECD, 2013). It proves that Shanghai has been successful in education reform and Shanghai schools have found their way to improve continuously (Zhang & Pang, 2016b).

Because of the success in PISA, Shanghai's experience in education reform has drawn attention from all over the world and Shanghai has become the center of educational research. For example, in 2014, the United Kingdom allocated 11 million pounds to fund 32 model schools across England, and invited experts from both Shanghai Normal University and England's National Centre for Excellence in the Teaching of Mathematics (NCETM) to improve mathematics education in England (Department of Education, 2014). Moreover, the government of England has decided to adopt the process of teaching multiplication, and translate Chinese versions of learning materials into English for their students (Han & Cai, 2016). In a nutshell, learning from successful educational systems may help understand the processes that support schools' continuous improvements in terms of enhancing the roles of teacher leaders.

Aims of study

In view of Shanghai being ranked top in PISA 2009 and 2012, and increasing significant roles and functions of teacher leadership in the success of educational reform, the present study has the following two research questions:

1. What is the role of teacher leadership in the context of Shanghai schools?
2. What are their functions of teacher leaders in school improvement in Shanghai?

Data collection

A qualitative approach using interviews with principals and teachers from six Shanghai schools were conducted. Three were primary schools, two junior middle schools and one high school. The principals of each school participated in the interviews, except that from the high school a vice principal was interviewed. In addition, the vice principals and 2-4 teachers from different ranks were also invited to the interviews. In total, five principals and 19 teacher leaders were interviewed with a protocol of pre-set questions. The interviews of the principals lasted for about an hour each and the interviews of teachers were conducted in focused group discussion which lasted for about 1-2 hours.

Findings and discussion

The significant role of teacher leadership and its contributions beyond classrooms have long been acknowledged and promoted by Chinese schools. An honorable title ‘backbone teacher’ is given to a teacher, who has been excellent in teaching or outperforming his/her counterparts with certain expertise. Backbone teachers are reviewed continuously and critically according to certain criteria, say, teaching excellence, research capability and administrative competence before they are selected to assume this title by their principals or senior officials from the education bureau (Wang & Cai, 2004). Backbone teachers are widely recognized in formal positions as grade leaders, subject leaders or directors of research groups (Wang, 2013). Once a teacher has acquired the title of ‘backbone teacher’, he/she would have greater opportunity for professional development, is entrusted with power and authority, and enlisted with a role of leadership in his/her position. Backbone teachers are commonly regarded as teacher leaders in Chinese schools (Jin, 2008).

Analysis of the interview data confirmed that teacher leaders in Shanghai schools do hold critical roles in supporting school improvement, particularly when schools face the challenges arisen from educational reform and changes arisen from competition due to globalization. Teacher leaders within Shanghai schools were expected to lead other teachers in different areas to strive for excellence. They were recognized as the key players to drive for school continuous improvement. One school principal explicitly pointed out the significant roles of teacher leaders in the teaching and research teams.

From the experience of our school, we now focus on the development of teaching and research teams. Such teams are formed due to the needs of our school development. In forming these teams, there are two key factors to be considered. First, a team must have teacher leaders. To be more specific, each team should have at least one to two teacher leaders and those who have innovative ideas or expertise. The Chinese wisdoms often say that ‘two heads are better than one’. From my own experience of growth, I can see that choosing and appointing of a good teacher leader within a team would be a determinant of the team’s success. Each teacher is unique. Most teachers have different strengths and expertise in different areas. We have to explore their potentials and let them contribute to school success.

Most principals acknowledged the important roles and functions performed by teacher leaders. They claimed that teacher leaders are the pioneers in school reforms and it is also they who support the reforms and embrace the changes arisen. These teacher leaders have proactive attitudes to the reforms and have adapted well in the

change processes. Teacher leaders through their proactive beliefs, attitudes and practices have demonstrated that reforms are possible and changes would bring positive benefits to the classroom and students. Most important, teacher leaders have set examples to their peers in how to cope with the challenges from reforms and changes. When we asked what major difficulties they encountered in the reform, a principal replied that:

The biggest challenge is that, when we want to improve continuously and to strive for excellence, I always feel that I do not have enough number of backbone teachers (teacher leaders). The availability of backbone teachers are not yet in a critical mass in my school.

From the interviews with the Shanghai school principals, it is certain that Chinese teacher leaders have played an important role in school reform and improvement. They are the key players who are expected to initiate reforms and improvement in terms of pioneers, agency to promote teacher learning, and reliable partners with the principals to advocate change.

Then what are the functions of teacher leaders in the processes of school improvement? Three themes that have emerged from the interviews are:

- (i) supporting young teachers for professional learning;
- (ii) leading curriculum development; and
- (iii) facilitating collaboration.

The backbone teachers (teacher leaders) in Shanghai schools have played a critical role in supporting young teachers to develop and to acquire the knowledge and skills of effective teaching. That is, there is a well-developed mentor-mentee system within each of the schools. This system can effectively lead to teacher professionalism throughout Shanghai schools. The backbone teachers host learning meetings, provide opportunities for professional learning in different subjects and lead school-based research activities within each discipline. The backbone teachers are entrusted and empowered to identify problems and priorities in teaching, explore difficulties in student learning, and most importantly, provide consultancy and support to junior and novice teachers. The following quotations are from three teacher leaders.

Like the first year teachers, particularly the ones who just came to our school, our school will arrange 'meetings of apprentice/consultation'. The novice teachers will be led professionally by the experienced ones, such as subject experts, to help them adapt to the profession of teaching promptly and become a practicing teacher in the classroom. Then, for our junior teachers, who have teaching experience with about two years, we (teacher leaders) would organize 'teacher salon' for them. It is a group meeting where junior teachers meet together for sharing, learning and improvement. They meet regularly, usually once a month, to discuss issues and difficulties in teaching encountered in the classroom.

The backbone teachers and subject experts are responsible for supporting our junior teachers and leading them to grow and become mature in teaching. We help them to prepare lessons step by step and evaluate the progress in every moment. We provide such support to them as least once and sometimes twice a month because they are expected to demonstrate teaching in open class and in public. We always encourage them not to be afraid, because it is an opportunity of growth and development. Their

demonstration of teaching in open class and in public are actually results of the team's endeavor, rather than individual work.

Junior teachers would take advice from the backbone teachers. From the backbone teachers the junior teachers learn how to prepare lessons, deliver instructions in class, and reflect on their own performance. In addition, junior teachers were also required to run a lesson on their own ideas and ways, then, we (backbone teachers) would sit in the class and observe the lesson. We would participate in the whole processes of preparation, conduction and reflection of the lesson and attempt to critically comment on the junior teachers' performance and help them to reflect and improve.

The second function of teacher leaders identified in the Shanghai schools is that the backbone teachers also play a role in leading curriculum development. Both principals and novice teachers would rely on backbone teachers as curriculum developers. Some backbone teachers (teacher leaders) expounded why and how they responded to the required curriculum changes and to align with teachers and students' expectations in their schools. These backbone teachers also play a key role in the development of school-based curriculum and instructions, while they have to adopt specific text books in the national curriculum.

We (English Department) are responsible for 'boya' class (a school-based curriculum). The Head of the Department designed the main part of the lesson, and we would carry it out based on the current requirements of the curriculum reform. Basically, it is a core course in the curriculum reform, that is, literacy. We need to cultivate students' literacy. From the perspective of English, it means that not only do we teach the language, but also, more importantly, introduce students to the English culture. When we combine the two elements together, then, it forms the basics of English literacy. When we put these together, we then have a 'boya' class.

Our team of backbone teachers led the development and publishing of the school-based curriculum into a resource kit for teachers, which comprises of 155 pages. It includes basic information of teaching strategies, learning methods, and cases for study. It is a deliverable from a collaborative team work because all the teachers concerned have made their contribution in it.

The third function of backbone teachers (teacher leaders) is to build teams, promote group work and enhance collaboration among team members. A teacher leader said that 'we pay much attention to collaborative work. No matter in educational and administrative duties, form masters' duties, and daily instructions, we all work together'. She continued that: 'In last year, I was promoted to the role of a leader who leads teaching preparation, and I had a small team of my own, including about four to five ordinary teachers. We worked together to research on how to make use of English as a medium of instruction and to have cross-curriculum integration with other subjects'. Another teacher leader claimed that she enjoys team work and collaboration, because it makes things possible and leads the school to success.

According to my working experience in the last two decades, I now strongly understand the importance of collaboration in our work. It is not a matter of how much knowledge you have, but a collaborative way of problem solving. Many things can only be made possible when we work together.

The spirit of collaboration has now deeply rooted in Shanghai schools. Collaboration and team work are the first priority in the daily management and administration by the teacher leaders. The degree of collaboration among team members has become an important performance indicator for teacher leaders in resource deployment and leadership responsibilities.

Conclusion

The importance of teacher leadership resides in the role and functions teacher leaders play. From our study in six Shanghai schools and the interview data obtained, it is evident that Shanghai teacher leaders have critical contributions in supporting their schools' improvement. Their contributions to the education reform in Shanghai and school success in the PISA 2009 and PISA 2012 are indispensable. It can be argued that educational reforms are more likely to succeed when teachers are involved and when they work collaboratively. Moreover, in order to sustain consistent school improvement, not only should school leadership focus on principals, but also, be extended to teachers who can act as leaders. With this new momentum for change, teacher leadership can contribute directly and positively to school improvement.

In addition to the critical contribution from teacher leadership that we identified in Shanghai schools, our study has further confirmed three specific functions that teacher leaders can engage in during their daily work. These functions are to support junior teachers to grow via professional learning, to lead and develop curriculum, and to facilitate collaboration amongst teachers. The findings are consistent with the Western literature. The accounts of teacher leaders' roles and functions have been much detailed in many teacher leadership studies. Teacher leaders should be enhanced in school, because they can play the core roles in schooling, which have direct impacts on both teaching and learning (Pang, Wang & Leung, 2016). Now in Shanghai schools, teacher leaders in various positions and areas are viewed as the center of classroom change, school improvement and educational transformation.

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Prof. Dr. Nicholas Sun-Keung Pang, The Chinese University of Hong Kong, Hong Kong,
nspang@cuhk.edu.hk

Mr. Zhuang Miao, The Chinese University of Hong Kong, Hong Kong,
willmiaozihuang@aliyun.com

Peter L. Schneller

Capitalism and Public Education in the United States

Abstract

The United States democratic system includes characteristics of capitalism as well as socialism. Perhaps the most socialistic endeavor of the US is its K-12 public school system; in fact, US public schools are necessary for democracy to thrive and to create an educated and well-informed populace. However, capitalism and socialism are strange bedfellows. The soft underbelly of capitalism - greed - has become a problematic influence for K-12 schools. This paper examines the history of US public schools and the influence of capitalism focusing on problems associated with greed at the individual and corporate level.

Keywords: capitalism, socialism, greed, No Child Left Behind (NCLB), Race To the Top (RTTT), Every Student Succeeds Act (ESSA)

Introduction

The United States has a unique history as a capitalist country. Many Americans believe that the primary force of the US economy has always been capitalistic in nature; however, US capitalism has traditionally been shaped by the tension between socialism and democracy. For instance, US law protects public goods and property, while protecting private assets. In addition, Social Security allows many senior citizens to avoid poverty as they age, even though individual privileges allow citizens to amass and control vast properties. The Fair Labor Standards Act gives workers rights while regulating unlimited wealth-based power. Nevertheless, US democratic principles, and in particular social justice, are the essential ingredients of American public schools; however, these principles are susceptible to human and corporate weakness. This paper investigates the history of US public schools in respect to the influence of capitalism and its soft-underbelly – GREED.

A brief history of US public schools and capitalism's impact

Organized education is relatively new to the United States. In fact, the US provides no constitutional obligation for a citizen's right to an education; furthermore, the 10th Amendment implies that education is the responsibility of each state (Capel & Schneller, 2016). Regardless, about 200 years ago, efforts by Catharine Beecher and Horace Mann helped Americans organize a system of common schools based roughly on the Prussian system (Goldstein, 2014). By the early 1840s, a system of schools could be recognized in Massachusetts, but agreement on the mission of education, pedagogy, and teacher training was a persistent problem. In the western frontier states and territories, teaching had an entrepreneurial feature. The teaching force consisted mostly of missionaries, who negotiated their pay with students' parents as they traveled throughout the West often residing in their pupils' homes.

Eventually by the mid-19th Century, Susan B. Anthony and Elizabeth Cady Stanton initiated concerted efforts that were inspired by the patriotic passion of education and designed to promote social democratic ideals, including women's rights and abolitionism; their efforts slowed as the fever of the oncoming Civil War began to peak (Goldstein, 2014). During the years after the Civil War and into the 19th Century, education and the US public schools took on a new cause of providing an education for freed slaves. Eventually black intellectuals, Booker T. Washington and W. E. B. Du Bois hyped education as necessary for emancipation. However, the schools founded in the years after the Civil War were troubled by poor funding, entrenched poverty, racial segregation, and low expectations. These same economic issues abound in US public schools today; however, capitalism and its soft underbelly (greed) did not seem to be an overwhelming problem to education until the 20th Century.

Capitalism and US public schools in the 20th Century

The US public school system was implemented in the early years of the 20th Century. Each school district utilized local control, led by a superintendent who reported to an elected school board of local residents. Local school boards concentrated their efforts on area demands and the need to train laborers for their communities (Bowles & Gintis, 1976). Almost exclusively male school superintendents controlled America's first school districts; they exercised top-down control of their district's school budget, the hiring of staff and teachers, and curriculum. This kind of control easily tempted their human impulses of selfishness and greed for wealth and power. Certainly not all superintendents of schools gave in to these impulses, but superintendents could manipulate their board and garner totalitarian power that could be wielded for financial and political gain.

One criticism of the public school system as it evolved was that it fostered capitalistic principles, which promoted the myth of meritocracy in lieu of the socialistic imperative of upward mobility. John Foster (2011, p. 3) asserts that schooling ...tends to evolve in the direction of capitalist-class imperatives, which subordinate it to the needs of production and accumulation. He goes on to claim that public schools are more concerned with compliance and adherence to rules – skills needed for unskilled factory labor – and that a high quality education that focuses on leadership skills is reserved for children of America's 'governing class' in private schools like Phillips Andover Academy (Bush's alma mater) or Punahou School (Obama's alma mater). Today the tuition at Phillips Andover is \$48,850 per year; at Punahou it is \$38,300-52,000. Unlike public schools, these are elite schools which enroll the children of US gentry.

There is a disparity in educational equity based on a family's social economic status. In 1973 the educational rights of children were debated in the US Supreme Court, which ruled in *San Antonio Independent School District vs. Rodriguez*, and asserted that, contrary to other interpretations of the 14th Amendment, education was not a fundamental right, and local property taxes could fund public schools. This decision ignored the Edgewood Concerned Parent Association's claim that this type of funding created wealth-based discrimination. Consequently education has remained contentious in respect to funding (Lurie, 2013). In fact, federal influence in education is often viewed as meddling (Capel & Schneller, 2017).

A new era of more federal influence in public schools began with President Johnson's War on Poverty and the enactment of Elementary and Secondary Education Act (ESEA) of 1965. ESEA made federal funds available for school districts with a high percentage of low-income families, and also for research and development, libraries, and pre-schools. Local school districts gained access to millions of dollars in Titles I, II, III, IV, and V grants to improve schooling for all US students. Unfortunately, by 1970 few modest gains were documented and the political climate changed, and President Nixon amended the Federal funding of ESEA. However, the money that was spent in the initial efforts of ESEA did not go unnoticed by corporate entities, specifically textbook publishers saw an opportunity for profits.

By the mid-1970s California and Texas were prized by publishers for textbook adoption; publishers chased state-funded schools by designing texts to fit each state's educational standards. In the initial campaign for better textbooks, the California State Department of Education fought for an elimination of 'patriotic pablum, at the cost of honest examination of where the nation had failed to live up to its creed of equality' (Ravitch, 2004, p. 7). However, eventually the state adopters went overboard by issuing social content standards that went beyond common sense. For example, if a textbook included a disparaging reference to the Hell's Angels motorcycle gang, the textbook would also have to cite the gang's positive contributions to society. On the other hand, fundamentalists who demanded that creationism and evolution be treated through a balanced perspective hijacked Texas textbook adopters. Publishers (Scott Foresman-Addison Wesley, Houghton Mifflin, Holt McDougal, and others) chased the profits, and greed trumped sounder educational practices.

Capitalism and US public schools in the 21st Century

The 21st Century has been dominated by educational policy that has created phenomenal profits for private corporations that serve schools, but educational policy scholars recognize that teachers often challenge federal mandates that appeal to corporations (Kohn, 2011). Kohn insinuates that the corporations that are usually involved in public policy operate strictly to increase their bottom line – profits. A good example of federal policy that benefitted the corporate bottom line is George Bush's No Child Left Behind (NCLB).

In 2001 President Bush reauthorized President Lyndon Johnson's Elementary and Secondary Education Act (ESEA) with NCLB. It ushered in reforms that required standards-based testing with measurable goals that were intended to improve individual outcomes for all US public school students. NCLB included a mandate that all students in grades 3-8 be tested annually. Unfortunately, when the law was initiated, few states had state testing programs that were refined to meet the law's requirements. According to Gerald Bracey (2005), inherent costs for testing and programming for US public schools were in the billions, which lured CTB/McGraw-Hill, Harcourt Assessment, NCS Pearson, Riverside (Houghton Mifflin) and Educational Testing Services into K-12 evaluation. Few states developed their own tests, and to this day private US corporations dominate the test market in the US. Perhaps even more alarming is that educators had some modicum of control in the instruction-based companies, now marketing and business

executives, who focus on revenue and profits rather than learning, are in control. Ironically, the corporations that serve the US public receive lax treatment, while public school teacher and student performances (and the data that they produce) are scrutinized meticulously. Since 2001, billions in US federal, state, and local funds are transferred to these testing providers yearly.

It seems that profit is the main motivator of most private providers of testing and publishing. In 2014 Project Veritas set out to prove that ‘crony capitalism is taking over America’s education system’. Investigative film journalists surreptitiously filmed Houghton-Mifflin Harcourt West Coast Accounts Manager Dianne Barrow, in which she revealed, “You don’t think that the educational publishing companies are in it for education do you? No. They’re in it for the money” (Haverluck, 2016). Barrow continued to state that Mifflin Harcourt aligns the textbooks to the standards and then sells workshops to school districts to help their teachers teach to the standards (and to the text), she added, “I hate kids. I’m in it to sell books, don’t kid yourself for a heartbeat.” (Haverluck, 2016).

Capitalism run amok: An example from Newark, NJ

In *The Prize* (2015), Dale Russakoff details the problems that can occur when the greed for power in politics and temptation of big money run amok. It began with a 2009 meeting during which political rivals, Cory Booker, the Democratic Mayor of Newark, NJ and Chris Christie, New Jersey’s Republican Governor, met to discuss the sweeping problems that existed in Newark’s public schools. Despite their political differences Booker and Christies decided to work together in what appeared to be an ingenious plan to help Newark City Schools. After developing a plan for becoming a hub for charter schools that included an influx of reform-minded teachers and administrators and top-down restructuring funded by philanthropic support, Booker seduced Silicon Valley venture capitalist turned philanthropist, Mark Zuckerberg into donating an initial \$100 million to save the Newark public school system.

Although Booker and Christie touted community-based and teacher-driven reforms, they hired outside educational consultants, and in short time it became obvious that neither the publically elected Newark School Board nor city residents had voice in the process. Eventually, Cami Anderson, a no-nonsense reformer, was hired as Newark’s superintendent. She utilized a business-style management model to lead the schools with a focus on high-stakes accountability for teachers and eliminated pay raises based on seniority and offered incentives (aka merit pay) for high performing teachers. Despite Zuckerberg’s funding, draconian budget changes, and the closing of many neighborhood schools, one year into Anderson’s tenure, Newark schools had a \$57 million gap in revenue. Most school employees were resentful because she had given significant raises to her leadership team and was paying a steady stream of consultants \$1,000-a-day for services that were not visible to teachers. She reported that based on her own school-rating scale learning in Newark schools was improving, but on the mandated state-standardized tests, Newark children had declined in all proficiency ratings in mathematics and all but two of the ratings in reading. In 2014 after four years of reform efforts and \$200 million from Mark Zuckerberg, the Newark experiment was deemed a failure.

Unfortunately, the trap of political power, recognition, and money clouded the focus on the needs of children and the Newark community.

President Obama's legacy in K-12 schools and capitalism

President Obama's first campaign for the presidency touted reforming NCLB, especially accountability measures that forced students to spend inordinate amounts of time 'filling in bubbles on standardized tests' and focusing on helping schools improve by not 'focusing on punishments' (FairTest, 2008). Race to the Top's (RTTT) inspired design required financially strapped states to compete for 4 billion dollars in federal funding, and in the process, instead entrenched NCLB's heavy handedness in both accountability and assessments.

Despite a low probability of winning the funds available through RTTT, local school districts chased the money. 'Though only nineteen states won RTTT grants, two-thirds of the states changed their laws on public school teachers in order to compete, half of the states declared that student test scores would be included in teacher evaluations, and eighteen states weakened tenure promotions' (Goldstein, 2016, p. 214). Diane Ravitch's (2013) critique of RTTT revealed that it did not fulfill Obama's campaign pledge and that in fact it proved to be a mirror image of its test-based accountability predecessor, NCLB. With NCLB, *schools* were held accountable for low student test scores, and schools as a whole had to deal with the consequences of failure. With RTTT, *teachers* are held accountable for test score failures. In essence, high-test scores determine a teacher is 'effective' and low-test scores determine whether a teacher is 'ineffective' (Ravitch, 2013).

According to several teachers and educational researchers, this type of system often proves unsuccessful because of its focus on the naiveté of political adversaries on public education. Fenwick English (2010, p. 3) sums up this simple-minded perception by stating the research in the field, '... the testing advocates want to believe that tests are neutral diagnostic tools designed to "help" schools become better', which overlooks years of research that shows that test scores are more indicative of the socio-economic status of the students being tested than their academic progress.

Unfortunately, NCLB and RTTT entrenched for-profit corporate greed in US K-12 public schools. However, hope abounds. Barack Obama's Every Student Succeeds Act (ESSA) was signed into law December 10, 2015 as yet another reauthorization of ESEA. It focuses on supporting academics regarding state accountability measures, reducing standardizing tests and the high stakes associated with it, and including teachers in decision-making (Garcia, 2016). The intent of ESSA relies on Kleibard's (1992, p. 3) advice '... without teacher input, policy fails as it crosses the threshold of the classroom door'. If the US wants educational policy to succeed as it minimizes the greed of corporate America, teachers and their students need to be valued as key decision-makers. Maybe then the US will eliminate some of the corrosive effects of greed in its public schools.

Capitalism and possibility – the Trump presidency

Considering the advent of the Donald J. Trump presidency, the US is entering a time of absolute uncertainty for its public schools. The US Senate and Congress

recently confirmed President Donald Trump's choice for Secretary of the Department of Education, Betsy DeVos. Her background is not in public education; in fact, she has never attended public schools, never taught or administered education in any way; she has been a champion of private and charter schools, as well as for federal funding of vouchers and school choice. Betsy DeVos wants to initiate 'legislative efforts and ballot measures designed to expand access to vouchers, increase the reach of charters (independent schools that receive public funding) and usher in a free market vision of public education' (Edwards, 2017, p. 65). Secretary DeVos's opinions coupled with President Trump's dystopian vision of public schools may spell disaster for US K-12 public schools. Trump referred to America's public system as 'flush with cash, but which leaves our young and beautiful student deprived of knowledge' (Blake, 2017). President Trump and Secretary DeVos share a dismal view of America's public schools and may open it to the free market, where greed abounds.

Conclusion

Some years ago I researched global mindset and its possibilities regarding education. One of the informal ways that I researched globalization (and its synonyms – cosmopolitanism, diversity, multi-culturalism, etc.) was to peruse the Internet to see the ways that American businesses focused on global endeavors. On many websites, one phrase that seemed to be most associated with the internationalization of US businesses was a mission to *take advantage* of foreign markets and diverse populations. To me this was indicative of the worst of capitalism, its predisposition for the selfishness of *taking advantage*. I hope that the US can recognize its capitalistic tendencies in public endeavors and minimize greed as a detriment to its greatest socialistic endeavor – public schools.

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Prof. Dr. Peter L. Schneller, University of Mount Union, United States of America,
schnelp1@mountunion.edu

Rita Kiselova & Aija Gravite

STEM Education Policies and their Impact on the Labour Market in Latvia

Abstract

This paper explores the results of implementing the state education policy aimed at satisfying the labour market demand for engineering and medicine specialists via strengthening STEM (science, technology, engineering, mathematics) education both in schools and higher education.

Keywords: OECD PISA, STEM education, higher education, labour market

Introduction

Education serves the development of society, state and economy, therefore education policy has far-reaching consequences for all citizens. However, it is important to ensure that government education policies are based on the results of research and education quality assessment. Thus they have a large potential for implementing effective reforms in education (Slavin, 2008).

Since the late 1990s the acronym STEM has been widely used in policy papers to describe studies in science, technology, engineering and mathematics in a context of educational policies aimed to strengthen these fields of study. It was introduced in the United States, a country that historically has been amongst the leaders in technologies. However, it was found that fewer students have been focusing on these topics recently: only 16 percent of high school students are interested in a STEM career (Hom, 2014). Gaps between STEM education and labour market demands have been widely discussed. Research however focuses more on a student's skills and competencies (Jang, 2015), leaving state education policies and their impact unexplored.

In Latvia, awareness of the increasing gap between the demand and supply of engineering, construction, medicine and other STEM educated specialists on the labour market increased in the mid-2000s. At that time the Ministry of Welfare concluded that due to constant changes and rapid development it is impossible for the education system to meet the labour market demands exactly. However, the education system faces the need to be much more flexible and open to changes as it permanently lags behind the technological progress (MW, 2007). Our previous research (Gravite, 2015) showed that a permanent interaction between education and the labour market exists – driven by the needs and interests of stakeholders (educators, students, employers) – despite the lack of official policy documents and activities.

To avoid potential labour shortages in medicine, technology and engineering, several policy steps have been taken in Latvia in the past ten years to stimulate STEM education at all levels. The aim of this research is to establish whether

education policy aimed at strengthening teaching of science and mathematics in schools and higher education institutions has resulted in a decrease of engineering and health vacancies in the labour market.

Research methods

In order to find out whether the education policies applied had an impact on students' achievements in schools, research results of OECD PISA were used. PISA (OECD Programme for International Student Assessment) assesses to what extent fifteen year old students, who are about to finish lower secondary education (in Latvia – basic education), have acquired the knowledge and skills necessary for a full participation in the civil society, and the ability of students to use the experience gained at school and to apply it to different life situations outside school and in further education. The objectives of PISA are to help develop and introduce evidence-based education policy and national education reforms while fostering the labour market. Therefore, the cycles of studies are regularly implemented, fully internationally verified, and comparable databases are created for analysis generating recommendations applicable to education (Kangro, 2015). To analyse changes in the Latvian students' achievements, results from PISA 2006 and PISA 2015 were used as these two research cycles were focused on science. PISA research does not simply evaluate a student's competencies in the particular subject; it also allows for judgement on his or her attitudes, motivation and values. The attention in Latvian education policy documents is focused on students' interest in continuing their education and career path related to sciences as well as developing their research skills. Therefore value changes of indexes related to the contextual factors are analysed using descriptive statistics and regression analyses. These contextual factors are:

- Science related career expectations – students were asked what kind of job they expect to have, when they are about 30 years old;
- Inquiry-based science teaching and learning practices – students reported to what extent they agree that:
 - a good way to know if something is true is to do an experiment;
 - scientific ideas sometimes change;
 - good answers are based on evidence from many different experiments;
 - it is good to repeat an experiment more than once to become sure of your findings;
 - sometimes scientists change their minds about what is true in science;
 - ideas in science books sometimes change.

To clarify whether education policies had an impact on the higher education and the labour market, i.e. whether the number of those studying and taking jobs in areas related to STEM education increased, two sets of statistic data were analysed and compared covering the period from 2006 till 2016. The Latvian Central Statistics Bureau databases were used to track changes in the labour market: rates of employment and vacancies in two areas corresponding to science and mathematics in education; engineering and health. Data on the number of students and graduates and the level of state finance support in both fields were found in the statistical

annual reports on higher education prepared by the Department of Higher Education of the Ministry of Education and Sciences.

Education policy

Advanced research, innovation and higher education has been prioritized as one of the key courses of action in National Development Plan of Latvia for 2014-2020 (CCSC, 2012). The main aim of STEM policy is to shape science and technology as bases for the sustainable development of the civic society, economy and culture. The plan considers the development of science and technologies to be a determining factor for economic sustainability, prosperity of the Latvian society and the preservation of environment and natural resources (MK, 2015).

STEM has been prioritized in policies of all levels of education in Latvia. During the past ten years a number of reforms were implemented:

- new state standards were developed for all levels of education;
- state budget financing in the higher education was redistributed in favour of STEM areas;
- mandatory centralised exam in mathematics was introduced for the secondary education graduates;
- a project ‘Sciences and Mathematics’ (funded by the European Structural Funds) was carried out in both primary and secondary schools in order to:
 - encourage children’s interest in natural sciences and mathematics;
 - exercise activities to change approaches to STEM education;
 - develop students’ research skills;
 - create and deliver new electronic and printed teaching materials to schools;
 - provide professional development to teachers.

Changes in students’ performance (PISA results)

PISA research evaluates students’ performance in three fields, mathematics, reading and science. One of them is singled out as the main field in each research cycle. Science was outlined for the first time in PISA 2006. Therefore the results of PISA 2006 are used in this research as a point of reference for establishing how students’ performance has changed in 2015 as all significant reforms in STEM education in Latvia took place after 2006. PISA 2015 focused on science as the major domain too, and defines science literacy as ‘the ability to engage with science-related issues, and with the ideas of science, as a reflective citizen’. This requires the competencies to explain phenomena scientifically, to evaluate and design scientific enquiry, and to interpret data and evidence scientifically (OECD, 2016, p. 50).

The metric for the overall science scale is based on a mean for OECD countries of 500 points and a standard deviation of 100 points that were set in PISA 2006. The items that are common to both the 2006 and 2015 test instruments and were found to measure science literacy comparably in the paper and computer-based modes, form a link with the earlier scale.

The average Latvian student’s performance in science is measured as 490 points both in PISA 2006 and PISA 2015 and they are not statistically significantly different from the OECD average. The average three-year trend for the mean, used

in PISA to track changes in students' performance, is the average rate at which a country's mean score in science has changed over consecutive three-year periods throughout its participation in PISA assessments (OECD, 2016). In Latvia the average three-year trend in science performance is 1.1 points, which means that our students' performance has not changed statistically significantly during last the ten years.

In order to be successful in science students need to have research skills and also knowledge of the role of research and connection with the development of science and innovations. PISA 2015 allows the definition of these skills using an index of inquiry-based science teaching and learning practices. For Latvian students the value of this index is 0.16. This means that our students have given concurring answers more often on formative questions of this index than students in OECD countries on average, determined as 0. However, a negative correlation has been found between the index of inquiry-based science teaching and learning practices and students' performance: if the value of index increases by one point, a student's performance in science decreases by 12 points. This means that either students' research skills or their ability to apply these skills in practice are not sufficient. Thus it is evident that the goals of ESF project 'Science and Mathematics' have been reached only in part.

Students' interest in science influences their willingness to build a carrier path in science in future. A question about their future profession asked students to imagine where they will be working at age 30 was included both in PISA 2006 and PISA 2015 questionnaires. Professions related to science were grouped as:

- science and engineering professionals;
- health professionals;
- information and communication technology specialists;
- science-related technicians and associate professionals.

Only 20% of Latvian students have expressed interest in choosing their career in these professions in PISA 2015. Comparing with PISA 2006, there is a slight increase from 17%, however, as on average in all OECD countries, it was caused by increased interest in health professions. In Latvia willingness to choose a career in health has risen by 5.4 percentage points (from 3.9 in PISA 2006 to 9.4 in PISA 2015), whereas interest in science and engineering has decreased (from 8.5% in PISA 2006 to 7.2% in PISA 2015).

Thereby PISA results show that the willingness of Latvian students to choose career paths in engineering, or related professions has not changed during the last decade. Only 7.2% of students expressed such interest, combined with those interested in information and communication technology, 10.1%, a fraction less than the average in OECD countries. However, the relative distribution of state funded study places in 2015 was intended to provide 42% for the combined study fields 'Science, mathematics and information technologies' and 'Engineering, industry and construction'. The comparison of students' willingness to study STEM and the distribution of state funds (i.e. public order) are evidence that a lot of creative efforts are needed to increase students' interest in STEM related studies and professions in secondary education level, as at the age of fifteen student's professional desires are far from education policy makers' expectations.

Changes in higher education

To establish whether policies in higher education aimed at improving the chances of better meeting the labour market demand in STEM fields has generated the intended outcome, statistical data on number of students and graduates in the following two fields, health as well as construction and engineering were analysed.

Health has always had prestige and has been a popular and competitive area of studies in Latvia. However, the demand for doctors and nurses has increased in recent years due to an aging population, leading to more demand for medical care. It has simultaneously also resulted in a brain-drain: as most EU countries face similar problems; young Latvian doctors quite often find more desirable positions abroad. Between 2006 and 2016 the number of state-funded study places in health have increased from 3848 to 6519, an increase by 70%. The total amount of medical students have increased even more, by 75% (from 6810 to 11 867). The number of students who gained qualifications in health also has risen from 1254 in 2006 to 2252 in 2016, an increase of 80%.

Engineering and construction had been a popular choice for studies in Latvia until the 1990s. After the collapse of the Soviet planned economy and the resulting loss of jobs for a large proportion of specialists with technological qualifications, engineering has lost its appeal. However, since the early 2000s economic analysts in Latvia have focussed on the need for a more increased share of high value-added domestic industrial production in the country's GDP. This led to predictions of an increasing demand for engineers and technicians in the labour market. Therefore policy makers have responded by increasing the number of state funded study places in engineering and construction by 30% (from 6857 in 2006 to 9081 in 2016).

According to the Ministry of Education statistics, the total number of engineering students has not changed significantly (the figures show a slight decrease to 12535 in 2015 from 13945 in 2009). Engineering and construction is the only field of study in Latvia where a surplus of state funded study places occurs, i.e. there are less people willing to study engineering full-time than the provided state funded study places would allow. The number of students who gained qualifications in this field also has not changed significantly. It even shows tendency to decrease in recent years, from 2596 in 2013 to 1963 in 2016.

The drop-out rate in engineering studies is the highest in Latvian higher education, reaching an average of 57%. Although this trend tends to be explained by difficult studies and decreased standards of STEM education in secondary schools, the situation in health, where students' knowledge is based on the same STEM basis and the study period is longer and even harder, the drop-out rate on average is only 11%, rendering the above explanation questionable.

Changes in the labour market

To establish whether education policies supporting STEM education resulted in a positive impact on the labour market, we compared the dynamics of average quarterly data of job vacancies during the last decade (2006-2016) in professions corresponding to the two study fields analysed above, health as well as engineering and construction, with the Ministry of Education statistics of graduates who gained qualifications.

In both fields a rapid decrease of vacancies was detected in the years 2007-2009, by 85% in health and by 92% in engineering and construction. The number of people gaining qualifications increased by 20% in health and remained unchanged in engineering and construction in the same period. From 2009 until 2014 the number of vacancies remained unchanged, and the total number of jobs decreased by 4% in health and by 30% in engineering and construction. At the same time the number of people gaining qualifications doubled in health and increased by 30% in engineering and construction. In 2014 new vacancies appeared in health, reaching 2% of total jobs in the field (back to the level of 2006) whereas in engineering and construction it remained unchanged at the level of 0.3%. The total number of jobs reached the level of 2007 in 2013 in health and in 2014 in engineering and construction. Since 2013 the number of jobs increase by approximately 2000 a year in both fields, and the number of people gaining qualifications roughly is the same.

Thus our research did not establish a strong interaction between the education policy and processes on the labour market in STEM-related fields. It is more likely that the dynamics observed in job vacancies were caused by the economic crisis of 2008 and a rapid increase of unemployment.

Since 2014 there is a growing demand for specialists both in health and engineering. In engineering and construction this demand statistically is covered by those gaining qualifications. This means that state funding provided for engineering and construction studies is sufficient, probably even exaggerated as 57% of engineering and construction students do not finish their studies. Fewer state funded study places would increase competition amongst students and consequently the quality of their education. In the health professions labour market demand leads to growing number of vacancies as the number of people joining the labour market after gaining qualifications is diminished by the brain-drain. This problem cannot be solved by education policy alone.

Conclusion

Education policies aimed to strengthen STEM in primary and secondary education in Latvia have not reached their goals as STEM competencies and research skills amongst students have not increased. Consequently, there are no changes in popularity of STEM related study areas in higher education and professional preferences of students. Medical professions have sustained their popularity, whereas engineering still remains unpopular, despite a sizable increase of state funded study places.

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Assist. Prof. Dr. Rita Kiselova, University of Latvia, Latvia, rita.kiselova@lu.lv

PhD Candidate Aija Gravite, University of Latvia, Latvia, aija.gravite@lu.lv

Corene De Wet

Reading Partridge's 'The Goblet Club' as an Integral Part of a Secondary School's Anti-bullying Programme

Abstract

Notwithstanding legislation and individual schools' codes of conduct prohibiting bullying, bullying is an escalating problem in South African schools. It seems as if existing anti-bullying policies, programmes and intervention strategies are failing to address the scourge. Bibliotherapy has been identified as a way to strengthen schools' existing anti-bullying programmes. This paper reports on findings from an investigation into the suitability of reading Partridge's *The Goblet Club* during bibliotherapy sessions which form an integral part of a school's anti-bullying programme. The study found that *The Goblet Club* gives an authentic, well-researched portrayal of bullying among boys, as well as teacher-on-learner bullying. The book sheds light on the bullies, victims, bully-victims and bystanders, types of bullying, and coping strategies employed by the fictional victims of bullying. The reading of Partridge's *The Goblet Club* as part of a school's anti-bullying programme will give learners the opportunity to use the fictional characters' struggles and aggression to gain insight into their own nemeses, different types of bullying, and the effectiveness of coping strategies.

Keywords: adult youth fiction, bibliotherapy, South Africa, teachers as bullies, victimisation

Introduction

Bullying violates the South African child's constitutional right to human dignity, freedom and security of the person, children's rights and the right to education (Laas & Boezaart, 2014). Notwithstanding, the legislative framework provided by the South African constitution, *South African Schools Act* 84 of 1996, the *Children's Act* 38 of 2005, the *Child Justice Act* 75 of 2008, and the protection orders provided by the *Protection from Harassment Act* 17 of 2011, as well as individual schools' codes of conduct prohibiting bullying (Laas & Boezaart, 2014), bullying is an escalating problem in South African schools (Coertze & Bezuidenhout, 2013). It seems as if existing anti-bullying policies, programmes and intervention strategies are failing to address the scourge. There is thus a need for school leadership to look at new or additional cost-effective ways to curb bullying in schools. Flanagan, Vanden Hoek, Shelton, Kelly, Morrison and Young (2013) identify bibliotherapy as an effective, cost-effective way to strengthen a school's anti-bullying programme. Through bibliotherapy, or the use of literature for the purposes of emotional healing and growth, children may learn about bullying and coping strategies through stories of other children's struggles and aggression (Flanagan et al., 2013). Flanagan et al. (2013) write that books that may be used as part of an anti-bullying programme should contain memorable protagonists and attention-grabbing storylines. These books should inform children about aspects of bullying, such as who the role-players are, the different types of bullying, coping

skills that are effective in reducing bullying, and offer solutions that victims will realistically be able to use.

The aim of this paper is to report on an investigation into the suitability of reading Partridge's *The Goblet Club* during bibliotherapy sessions that form an integral part of a secondary school's anti-bullying programme. To attain the aforesaid aim, this study was guided by the following questions:

- How is bullying portrayed in *The Goblet Club*?
- Is the portrayal of bullying in *The Goblet Club* in line with research findings on the topic?
- Can bibliotherapists draw on *The Goblet Club* to help children cope with bullying?
- Can *The Goblet Club* be utilised as part of a school's anti-bullying programme?

Book selection

Building upon the premises that the authors of good young adult fiction (YAF) reach an audience because 'they have placed their fingers on the pulse of adolescents and metaphorically engage them where they live' (Larson & Hoover, 2012, p. 49), this research project focuses on books that have received the M.E.R. prize for YAF during the period 1995 to 2015 (cf. *South African awards for Children's and Youth Adult books*, [sa] for a list of books that have won the award). The researcher read all the books that received the M.E.R. prize for YAF during the period 1995 to 2015. While eleven of the books describe one or more incidents of bullying, only *The Goblet Club* has bullying as a leading theme. I therefore decided to analyse the book's portrayal of bullying in order to evaluate its suitability for inclusion in an anti-bullying programme for secondary schools.

The story

Mark Llewellyn-Bryce, the protagonist in Partridge's (2007) novel is sent to St. Matthew's College for Boys by his parents as 'one more punishment for years of bad behaviour' (Partridge, 2007, back page). This dark novel of betrayal and abuse is set against the background of a boys' only boarding school that accommodates boys who are 'troublesome and disobedient [and] thrown out of other schools' (Partridge, 2007, p. 11). The members of the Goblet Club, Mark, Trent, Vlad and Francis, dedicate themselves to the study of poison. Initially they use poison to rid the school of its rat plague. Later on they use their knowledge of poison to poison the resident bully (John Venter) and murder the headmaster (Solomon Crabtree). While the relationship between Mark and Venter is a recurring subplot, teacher-on-learner bullying is a leading theme in *The Goblet Club*.

The portrayal of bullying in *The Goblet Club*

The role-players: bullies, victims, bully-victims and bystanders

While research on bullying in schools focuses predominantly on learner-on-learner bullying, *The Goblet Club*'s main focus is on teacher-on-learner bullying.

The ensuing discussion will firstly look at Partridge's (2007) portrayal of teachers as bullies; thereafter, attention will be given to learners as bullies, victims, bully-victims and bystanders. The story is set against the background of a boys' only school. The only females mentioned in the book are Mark and Francis's mothers. All descriptions of incidents of bullying are those of boys and male teachers bullying boys. Cross gender or female-on-female bullying dynamics could thus not be explored.

Teachers as bullies

The antagonist, Crabtree, seems to be the embodiment of evil. Words such as 'madman' (Partridge, 2007, p. 110), 'evil' (Partridge, 2007, p. 137), 'sadistic' (Partridge, 2007, p. 23) are used to describe the headmaster of St. Matthew's, Crabtree. Crabtree's speeches during assembly were the 'tirade of an egotistical bigot' (Partridge, 2007, p. 42). Francis, one of Mark's friends, said that 'Crabtree thinks he is a priest or something, but he is more like a dictator. I just can't decide who he is more like: he's as tyrannical as Hitler, but as asinine as Napoleon, so maybe he's a bit of both' (Partridge, 2007, p. 61). Crabtree is however not the only bullying teacher. The author describes Woolf, Moolman and Ogilvie's verbal, physical and emotional abusiveness towards the learners in detail (Partridge, 2007). Partridge characterises the St. Matthew's teachers as heartless, abusive, unprincipled, and cowardly individuals who enjoy abusing their power. This characterisation is in line with findings by De Wet (2014, p. 8) on bullying teachers, namely that 'lust for power and lack of empathy [are] key characteristics of the bullying educator'.

Learners as bullies, victims, bully-victims and bystanders

In the portrayal of learners as bullies Partridge (2007) focuses on Venter and gives the following description of him:

... a stout boy with arms roughly the size of those belonging to a New Zealand rugby player... He had a squashed pink face that clashed horribly with his red hair... Every school has them, those unfortunate kids who find that making other boys lives miserable is the only way they can make sense of their own unhappy lives (Partridge, 2007, p. 14).

Venter is described as a 'bluntly arrogant' (Partridge, 2007, p. 98), but cowardly individual, who left Mark alone if he was with his friends, but 'when I was alone, it was another story altogether' (Partridge, 2007, pp. 54-55).

Partridge's portrayal of Venter as a spineless, unhappy individual supports the myth that bullies are unhappy individuals with low self-esteem. Danielson and LaBonty (2009) and Ma (2001) found that children who bully are more likely to have high self-esteem and suffer less anxiety and insecurity than their peers. Partridge's portrayal of bullies is however, not altogether wrong. Bullies have, as portrayed by Partridge, little empathy for their victims, are aggressive and have a need to dominate others (Danielson & LaBonty, 2009). Some references are made in the book to boys who were bullied by Venter and other (unnamed) bullies (e.g., 'Bullies like Venter were common and they terrorised the weak without constraint' (Partridge, 2007, p. 23)).

Mark and Thomas however, are the only two victims who are identified by name. Of these two, only Thomas can be labelled a 'true' victim. Thomas Newberry, the 16-year-old nephew of Crabtree, who also acted as Crabtree's secretary, was sexually abused by his uncle. It seems as if this abuse was common knowledge among learners. This led to his victimisation. In a letter to Mark Thomas wrote: 'The boys at school laughed at me. They called me 'nancy boy'. I realised that they knew about what was happening to me and that they amused themselves at my expense' (Partridge, 2007, p. 90). Thomas did not retaliate; on the contrary, he became a pitiable recluse. Partridge's characterisation of Thomas is in line with research findings by Ma (2001), namely that victims of bullying have low self-esteem and high social anxiety, are often without friends, lack social skills, and will rarely defend themselves or retaliate.

Sekol and Farrington (2010, p. 1759) found that children who are both bullies and victims in school are 'an especially problematic group' characterised by restlessness, hot-temper, impulsiveness, aggressiveness, hyperactivity and behavioural misconduct. They are mostly disliked by their peers and are more likely than 'pure' victims to be bullied physically. The aforementioned characterisation holds true for Mark, e.g. he head-butted Venter, his only friends were his fellow Goblet Club members, and Mark and Francis acted out their reputation as delinquents and vandalised school property (Partridge, 2007). Mark showed no remorse for his delinquency: 'I don't think I am a bad kid, just misunderstood... I am unapologetic of my wicked ways' (Partridge, 2007, p. 1).

An important group of children who are affected by bullying are those children who are neither victims nor perpetrators, but who see bullying happening to their peers. According to Mestry, Van der Merwe and Squelch (2006, p. 48) bystanders rarely intervene; they can 'idly stand by or look away, afraid to step in for fear of becoming a target themselves or they can actively encourage or join in the bullying'. These findings hold true for the bystanders in *The Goblet Club*: during a physical altercation between Mark and Venter 'there were students all around us as well as prefects, but no one intervened... Fights were commonplace at St. Matthew's, so instead of trying to break us up, they spurred us on' (Partridge, 2007, p. 100). The apathy of bystanders, as depicted in the above citation, is typical during incidence of bullying (Mestry et al., 2006). Yet, two examples of bystanders becoming involved in bullying situations, and siding with the victims, are described in the book. Francis came to Mark's aid when the latter was viciously attacked by Venter (Partridge, 2007). Mark helped Thomas to escape from St. Matthew's, thus giving him an opportunity to escape from his abusive uncle and the verbal humiliation by learners (Partridge, 2007).

Types of bullying

De Wet (2016) distinguishes between three types of bullying, namely verbal (e.g., name-calling, threats, racist and sexist remarks and teasing), physical (e.g., hitting, hair pulling, biting, punching and poking) and nonverbal (imagery and gestures) bullying. De Wet (2016, p. 31) notes that there are also forms of bullying 'that have a specific nature due to among others its purpose or platform', such as emotional, discriminatory and cyber-bullying. This paper will draw attention to one of these specific forms of bullying, namely emotional bullying. Emotional bullying

is anything that causes emotional pain and can include isolating or excluding someone, defamation, humiliation, blackmail, manipulation, intimidation and marginalisation (Coertze & Bezuidenhout, 2013; De Wet, 2016). Attention will firstly be given to the three types of bullying perpetrated by teachers; thereafter, the focus will be on verbal and physical bullying among learners.

Types of bullying perpetrated by teachers

The book abounds in examples of teachers physically abusing their learners. Teachers used their hands or books to hit learners over the head. Learners had to stand for prolonged periods of time during detention. They were even forced to stand outside the class while it was raining (Partridge, 2007). Corporal punishment was not uncommon, with learners often returning from Crabtree's office 'bruised from his belt' (Partridge, 2007, p. 43).

I identified numerous incidences of St. Matthew's teachers verbally abusing the learners. Mr. Woolf told Collins, one of the learners, that 'I think that you are a sad, sad individual who is going to end up making a mockery of himself on street corners for money'. After humiliating Collins, Woolf 'passed onto the next boy and repeated the same exercise, ridiculing him and putting him down. He was an expert' (Partridge, 2007, p. 33). The teachers called the learners all kinds of names, e.g., 'Here you will eat off the floor like the runt that you are' (Partridge, 2007, p. 33); 'what I see before me are the dregs that cannot be washed away' (Partridge, 2007, p. 43); and 'you are the black sheep whom society has cast aside into the wilderness. Thieves and good-for-nothings' (Partridge, 2007, p. 42).

The assumption put forward by Partridge, namely that teachers subject their learners to physical and verbal bullying is supported by De Wet's (2014) study. She found that 55.6% of the teachers who took part in her study characterised teacher-on-learner bullying as verbal abuse. She furthermore found that learners were subjected to physical abuse, especially corporal punishment.

Teachers should act *in loco parentis* towards learners. It can therefore be argued that if teachers forsake their role as caregivers and use their position of power to humiliate learners, they may be guilty of emotional bullying. Woolf treated the learners 'like absolute cretins and he never missed an opportunity to affirm Crabtree's opinion of us: that we were good for nothing criminals who had no future to look forward to' (Partridge, 2007, p. 31). Woolf told Mark that 'no one gives a damn about you here... you are nothing but a little boy who is going to be walked upon and forgotten' (Partridge, 2007, p. 33). After an altercation with Venter, Mark walked around the school with a blue eye for more than a week: 'but I could have been wearing a sombrero for all the attention that my teachers gave me' (Partridge, 2007, p. 56). Through the words of the protagonist, Partridge (2007, p. 43) criticises the teachers of St. Matthew's for a lack of care and an unwillingness to stand up against the abusive headmaster:

More than once, I saw a student returning from Crabtree's office, bruised from his belt, or broken from his words, and still the teachers did nothing, not even offer a word of sympathy to the victim. Crabtree was king in his kingdom, and it seemed to me like no one stood in his way.

Types of bullying perpetrated by learners

A reading of *The Goblet Club* revealed only two types of bullying among the learners, namely verbal and physical bullying. Numerous vivid descriptions of physical altercations between Mark and Venter are found in the book. The following two examples will suffice:

He confronted me as I was coming out of assembly one morning and hit me square in the stomach... I doubled over and concentrated hard not vomiting (Partridge, 2007, p. 56).

As soon as I stepped through the door, [Venter] grabbed my arm and whirled me around to face him. I jerked backwards and threw my book bag into his face, causing him to stumble backwards... This time, I meant to fight back. He lunged at me and I hit him square in the nose with my fist (Partridge, 2007, p. 100).

Contrary to research findings, namely that verbal bullying is more common than physical bullying among children (Coertze & Bezuidenhout, 2013), *The Goblet Club* focuses mainly on physical altercations between Mark and Venter. Only a few examples of verbal bullying among learners were identified. Venter threatened Mark by saying 'I'm going to break your face every single day until even your own mother won't want to look at you' (Partridge, 2007, p. 15). Venter also 'grinned' at Mark 'whenever we passed each other, whether I was with my friends or not' (Partridge, 2007, p. 56). Thomas was often subjected to name-calling ('nancy boy') and scornful laughter (Partridge, 2007, p. 90).

Coping with bullying

Flanagan et al. (2013) has investigated the coping strategies of victims. Coping strategies that are found to be ineffective, have also being found to be the most commonly used strategies, such as retaliation, ignoring and distancing (Flanagan et al., 2013). These ineffective strategies are also the preferred strategies of the victims in *The Goblet Club*: Mark tried to avoid Venter, especially when his friends were not in the vicinity. On one occasion he even ran away. When avoidance failed, Mark also resorted to violence and became a bully-victim (Partridge, 2007). Thomas, who should be seen as a 'true' victim, turned into himself and became a desolate, pathetic figure when he 'realised that nobody was going to help me and something broke inside me; the small shard of hope that remained inside me was gone forever' (Partridge, 2007, p. 90).

Researchers (Flanagan et al., 2013) often recommend that victims of bullying should turn to adults, i.e. parents and/or teachers when they are victimised. With the exception of one teacher – who was forced to resign – all the adults in the book, parents and teachers alike, are portrayed as uncaring individuals. It is therefore understandable that none of the victims of bullying turned to them for help.

Conclusion

In *The Goblet Club* Partridge gives an authentic, well-researched portrayal of bullying amongst boys and teacher-on-learner bullying. A reading of the book gives insight into the possibility of teachers verbally, physically and emotionally abusing those placed in their care. *The Goblet Club* sheds light on the characteristics of boys as bullies, victims, bully-victims and bystanders. The fictional characters resorted more often to physical than verbal bullying. Coping strategies preferred by the

characters are avoidance and retaliation. The reading of *The Goblet Club* as an integral part of a school's anti-bullying programme will give learners the opportunity to use the fictional characters' struggles and aggression to become aware of their nemeses, whether it is bullying fellow-learners or teachers, as well as the different types of bullying. During bibliotherapy sessions attention can also be given to the feasibility of the coping strategies used by the fictional characters.

The Goblet Club was written to entertain young adults. It is therefore understandable that empirical details would, at times, take the backseat to adventure, intrigue and character development. This should not be seen as a stumbling block to reading *The Goblet Club* as an integral part of a school's anti-bullying programme but rather, as an opportunity to highlight the myths surrounding bullying, the gender dynamics of bullying, different types of bullying, the role of bystanders in the perpetuation of bullying, and alternative, more effective coping strategies, such as assertiveness and problem solving.

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Prof. Dr. Corene de Wet, University of the Free State, South Africa, dewetnc@ufs.ac.za

Vimbi Petrus Mahlangu

Implementation of School Uniform Policy and the Violation of Students' Human Rights in Schools

Abstract

The paper highlights the violations of students' human rights in schools. The problem is the incident that took place at a school in Pretoria in 2016 where Black girls protested against the School's Code of Conduct relating to hairstyle. Qualitative approach was used to collect information through a literature review and desk-top research methods. Black girls claimed they were discriminated against and the protest serves as an example to demonstrate students' human rights violations when schools implement school uniform policies. Inequality in schools is rife in South Africa. School uniform policies with regard to dress codes are expected to reduce school violence, prevent discipline issues, and improve in school safety. Students have rights and their rights can include issues regarding cultural, economic, and political freedoms. Students, especially adolescents, respond very negatively to school uniforms.

Keywords: wrongful discrimination, waiver and consent, school uniform, coercion, equality principle, violation, human rights, substantive equality

Introduction

The interpretations of the implementation of school uniform policies and the violation of students' human rights in schools are not neutral but very much embedded in cultural and political assumptions. The grand narrative of human rights contains a subtext which depicts an epochal contest pitting savages, on the one hand, against victims and saviours, on the other (Zembylas, Charalambous, Charalambous & Lesta, 2016). Appearance concerns are an increasing issue among adolescents (Cribb & Haase, 2016). Schools are able to regulate students' behaviour with the aim of maintaining discipline. Advocates of school uniform suggest that uniforms can minimise dress-related problems, such as promoting an effective climate for teaching and learning, creating prospects for self-expression, increasing school safety and security, promoting school unity and pride (Yang, 2017). This paper presents an argument from an opposing view that school uniform policies can violate students' human rights in schools. While both sides of the argument have pros and cons, the prime reason for schools to use school uniforms is to lessen and improve students' behaviours. The fairness issue has been obscured by the tendency of scholars and courts to frame the conflict exclusively in terms of schools' autonomy interests against the child's best interests, and that courts have almost uniformly focused on schools' autonomy. Both have substantially undervalued a shared, societal interest in the integrity and fairness of the criminal justice process (Sabelli & Leyton, 2001).

Joldersma (2016) is of the view that vulnerable individuals in our society are often harmed because of membership of a vulnerable group. These factors reveal

that being wronged is regularly associated to membership of groups that collectively are on the social periphery, marginalized by social attitudes, legislated laws, institutional policy, and informal social practices. Wrongful discrimination refers to unjustified distinctions between persons. The fact that complaints of discrimination generally point to the differential treatment shows that discrimination is a comparative wrong (Hellman, 2016).

Method

A qualitative approach was used in exploring the implementation of school uniform policy and the violation of students' human rights in schools. Data were collected by means of a literature review and desk-top research.

Equality principles

The equality right principle of 'treat me the same unless there is a good reason for different treatment' was violated in the case of Pretoria School for Girls (Simons, 1985, p. 391). Equality principles are the most obvious example of a constitutional constraint in which the status of the school benefits as a 'gratuity' seems largely irrelevant (Simons, 1985). Even if a school is distributing a 'gratuitous' benefit, such as an education benefit, it must distribute the benefit 'equally' in the relevant sense; it cannot distribute the benefit only to white students, or to an irrationally chosen subgroup (Simons, 1989). Some constitutional and legal rights are concerned with comparative injustice and others with non-comparative injustice. Hellman's claim in Simon's (2016) article that the wrong of discrimination can be explicated either as comparative or non-comparative can be deemed controversial. By definition, wrongful discrimination refers to unjustified distinctions between persons. The independent [non-comparative] conception of discrimination makes the term 'discrimination' lose its moral resonance (Simon, 2016).

In some American schools students with disabilities are over 50% more probable to experience school corporal punishment than their peers without disabilities in 67% of school districts in Alabama, 44% in Arkansas, 34% in Georgia, 35% in Louisiana, 46% in Mississippi, and 36% in Tennessee (Gershoff & Font, 2016). In a report from Human Rights Watch and the American Civil Liberties Union (ACLU) (2009) found that administrators sometimes administer punishment to children with disabilities for behaviours that stem from their disability, such as those endemic to autism, Tourette's syndrome, or obsessive compulsive disorder (Gershoff & Font, 2016). This argument helps the researcher to recognize that there are different ways in which one can understand the distinction between a comparative and a non-comparative approach to justice. There are (at least) three different ways one might characterize the distinction between comparative and non-comparative justice claims. The names used are pseudonyms to refer to hypothetical students called 'Peter and John' to illustrate a point below.

First, people might be pointing to the structure of the complaint of the person alleging discrimination. Does the complainant, let's call him 'Peter', say: "I got raw deal when 'John' (someone else) got a better deal; that's not fair" (the comparative complaint)? Or does the complainant say: "I got a raw deal when I should have received a better deal; that's not right" (the non-comparative complaint).

Second, the distinction between comparative and non-comparative claims may mean what we might call the normative grounding of the claim. In other words, how do we assess 'Peter's' treatment? Must we look to see how other people are treated in order to determine if 'Peter' received the treatment he deserves? If discrimination is a comparative injustice, then schools should be in a position to determine if students' human rights are violated by comparing the treatment of all students, for example, 'Peter's' treatment (receiving of a raw deal) when compared (with the treatment accorded to John's treatment (receiving 'a better deal')). In contrast, if discrimination is a non-comparative injustice, schools should look at the treatment accorded to 'Peter's' violation of human rights in the form of a 'raw deal' and assess if this is the correct way to treat students, for example, 'Peter' in this case (without comparing that treatment to the treatment accorded to any real or hypothetical other person). If the permissibility of 'Peter's' treatment depends on the comparison with the treatment accorded (or that would be accorded) to 'John', then the claim is one of comparative justice (Hellman, 2016, pp. 114-115).

Substantive equality

This principle means that non-elective characteristics, such as sex and race, should not affect the way people are treated by those in authority.

Differential treatment of subordinated social categories of students can be regarded as substantive equality when it benefits them on four interrelated dimensions: redistribution, recognition, transformation and participation. Redistribution is primarily concerned with resources and benefits, including representation in the school, and access to dispute resolution procedures. Recognition refers to the elimination of status-based stereotyping, humiliation and violence. Transformation aims to remove historically biased institutions that turn differences into a detriment. As for participation, it relates to the inclusiveness of political and other spheres of decision-making where minorities have traditionally been absent in the school's structures (Dupont, 2016, pp. 292-293).

Some research has shown that having uniform dress codes can reduce school violence, discipline issues, and improve school safety and climate (Dulin, 2016). Originally school uniforms were introduced to hide the social differences between students. Using standard uniforms can also save money that is needed to buy extra clothes as fashion to impress other people at school. Uniforms can reduce the conspicuous advantages of rich people, who can afford costly items, which show how much more wealth they have than other people. There are several types of economic bullying which can be lessened by the use of school uniform. Many schools across South Africa also provide the choice between a summer and winter uniform, with khaki uniforms and brown shoes being very common in the summer in some schools. South African law has not required gender neutrality in school dress codes and a distinction between girls' and boys' uniforms remains. School corporal punishment is currently legal in 19 American states, and over 160,000 children in these states are subject to corporal punishment in schools each year (Gershoff & Font, 2016).

Inequality of participation in schools because of uniform costs means that the benefits of education are disproportionately enjoyed by children of comparatively wealthier families far more likely to complete secondary school or to enroll in

higher education while poor families may not be able to afford to financially support their children through school, hence the tendency for higher dropout rates in this group (Wambugu & Mokoena, 2016).

The decisions School Governing Bodies make about gender enrollment and school uniform policy affect how parents and students perceive the school (DiMartino & Jessen, 2016).

Some educators at Pretoria High School for Girls are of the view that there was no racial discrimination in relation to the enforcement of the Code of Conduct in relation to hairstyles; nevertheless, there was a need for greater clarity and understanding on the part of certain White educators. It was indicated in the report by the majority of Black students interviewed, that Blacks' hair does not grow downward like Whites' hair, and that it grows up, and it was difficult to create rules to regulate it. In support of the above viewpoint, some educators at the school confirmed that the issue of hair was a very sensitive issue at the school (Harris, Nupen & Molebatsi, 2016).

According to Moser (2016) in Indonesia because of uniform rules some students arrived at school wearing a batik shirt, their most formal school uniform worn on national holidays. Others wore their regular formal uniform used for the Monday flag ceremonies. Some wore their school tracksuits, prepared for Senam Pagi Indonesia, the Friday morning calisthenics. Others were dressed in their Saturday uniforms of traditional Malay wear, also a symbol of Muslim faith. These students realised that they are all wearing different uniforms and asked teachers as they arrived in the school yard what the proper uniform was for that day. Teachers were unsure and waited until the principal arrived, who announced that during the month of Ramadan it was compulsory for all students to wear traditional Malay costumes. Many students went home to change, and one boy wearing a tracksuit lived too far away from the school and could not go home. He sat on the ground in the corner of the yard humiliated and crying while he was teased by other students for being bodoh (stupid, ignorant) for wearing the wrong uniform. These cases of uniform in South Africa, Indonesia and Thailand are illustrating the extent of the violation of students' human rights in schools.

In Thailand student uniforms at both school and university levels were regulated nationally from 1939 under the ultra-nationalist Prime Minister Field Marshal Po. Phibun Songkram via the Student Uniform Act (Royal Gazette, 1939) and again in 2008 via another such Act signed by outgoing Prime Minister General Surayut Chulananon, which repealed the earlier Act. School uniforms are worn to reflect the Thai identity in schools (Draper, 2016). Therefore, wearing "ethnic" school uniforms featuring school colours is common in primary and secondary schools in the North of Thailand schools.

Waiver and consent

Do unconstitutional conditions cases necessarily involve waiver of a right or consent to its infringement? If students are aware of the conditions and 'choose' the benefit anyway, do they have no cause to complain? 'Waiver' and 'consent' are malleable and controversial concepts. They are not sufficient grounds for precluding every unconstitutional conditions claim. Often students are not fully aware of the conditions; often they have a constricted practical choice; sometimes it is simply

unfair for the schools to put certain kinds of choices to students; and some constitutional rights are entirely unwaivable or inalienable (Simons, 1989).

Consent or assumption of risk situation

A student has three choices to make in a school:

- (1) Not engaging in an activity (and also obtaining certain benefits);
- (2) Engaging in the activity and encountering a tortuously created risk and also attaining certain benefits; or
- (3) Engaging in the activity and not encountering that risk and also attaining certain benefits (Simons, 1987).

Consent, in the sense of full preference, is the most viable concept underlying assumption of risk and intentional tort consent doctrine. But the term consent can be misleading here. Sometimes a plaintiff may agree not to hold a defendant liable for conduct that would otherwise be tortious. Such waivers will often be enforced, especially when they are in contractual form. However neither consent to an intentional tort nor assumption of the risk of negligent and other tortious behavior usually reflects this form of agreement – even if ‘agreement’ encompasses implicit agreements or unilateral expressions of intent (Simons, 1987, p. 224). Students for being in schools do not mean that they have consented to the violation of their human rights.

Coercion

The concept of coercion is sometimes used loosely in this area, but it is usually inapposite. Under a strict definition of ‘coercion’, a school ‘coerces’ a student only if, among other things, the school intends that the student should not exercise a right, and she in fact does not exercise the right (Simons, 1989). In the case of Pretoria School for Girls, for example, the school did not really ‘coerce’ Black students. Teachers violated the students’ convictions about their human rights, since there was no reason for them to believe that the motivation given in the uniform policy requiring compliance was indeed a violation of students’ rights.

In America Black students are at a much greater risk of being subject to corporal punishment than White students in those states where it is being used. Black children in Alabama and Mississippi are at least 51% more likely to be corporally punished than White children in over half of school districts, while in one fifth of both states’ districts, Black children are over 5 times (500%) more likely to be corporally punished (Gershoff & Font, 2016). According to Gershoff & Font (2016, p. 8), ‘Black children receive all forms of school discipline at a higher rate than their White peers and they are disciplined more severely than their non-Black peers for the same misbehaviours’. The disciplining of learners in a discriminatory manner amounts to discrimination and these is a violation of students’ human rights. Subjecting students to coercion will destroy their development in mental capacities. It can eliminate options available to students. It is true that autonomy does not require the maximization of the number of options, but only an adequate range of valuable options – neither any option in particular nor a maximal quantity. Thus the coercive reduction of options undermines the students’ human rights. Students’ rights will always be violated by subjecting them to coercive policies (Abizadeh,

2008). In terms of section 36 (1) of the Constitution of the Republic of South Africa, rights may be limited only in terms of law of general application to the extent that the limitation is reasonable and justifiable in an open and democratic society based on human dignity, equality and freedom, taking into account all relevant factors, such as – the nature of the right; the importance the importance of the purpose of the limitation; the nature and extent of the limitation; the relation between the limitation and its purpose; and less restrictive means to achieve the purpose (Republic of South Africa, 1996).

Conclusion

The paper argues that schools that exploit vulnerable students in causing harm or wrong to them can justifiably be considered violating their human rights. Schools are expected to engage in human rights praxis with the understanding that students have human rights irrespective of race, origin, color, disability, sex, pregnancy, and language. Dominant discourses of group supremacy should be avoided in schools. One of the main challenges facing teachers in implementing school policies is the difficulty in understanding where the issue of human rights starts and where it ends.

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Prof. Dr. Vimbi P. Mahlangu, University of South Africa (UNISA), South Africa, mahlavp@unisa.ac.za

Amelia Molina García, José Antonio Sáenz Melo & José Luis H. Andrade Lara

Influence of International Organisms in the School Management Autonomy as an Education Policy

Abstract

A “worldization” process of the education system started during the later years of the last millennia. This movement has been strengthened through the participation of supranational organizations, in which their recommendations have served as the source of guidance in the definition of educational policies of the associated countries. One of the phenomena related to the context of *globalization* is the *decentralization of the education systems*, in which the process is paired with the generation of policies that promote education management independence. Through this context, we analyze the role that *globalization* plays on the emergence of *supranational policies*. How have these processes of *decentralization* occurred, in which way is the *dissemination mechanism* promoted, and what is the incidence of *veto players* in the positioning of an educational public policy, and its supranational, national and sub national dissemination.

Keywords: educational policy, management autonomy, supranational organisms, education system, comparative study

Introduction

Globalization, considered not only through an economic context, has influenced the transformation of the education systems, particularly through the declarations of the supranational organizations. These organization have influenced the way educational systems organize their schooling centers, their plans and academic programs, as well as the way performance, also known as educational accomplishments, is measured. For us, it is of special interest to analyze in what way the decentralization processes have been generated in Latin America, particularly the processes by which autonomy of education management is achieved. Therefore, we consider that this work constitutes a space to review and analyze the role of supranational agencies in the definition of policies routed to achieve educational management autonomy in Latin America, mainly considering the public-school system in Mexico.

It is worth pointing out that this investigation is part of line of investigation to generate knowledge about educational policies, social subjects, management and institutional development corresponding to the “Cuerpo Académico de Estudios Comparados en Educación de la Universidad Autónoma del Estado de Hidalgo” [“Academic Body of Comparative Studies in Education of the Autonomous University of the State of Hidalgo”].

The work is structured in four sections:

- 1) The position of supranational organization in a globalization context.

- 2) The relation between decentralization and education autonomy.
- 3) The *dissemination mechanism* as an example of the external effects in the conformation of an educational policy.
- 4) The role of the *veto players* in the definition of educational management autonomy.

The position of supranational organization in a globalization context

We focus on the problems affecting educational management autonomy as the starting point, and the phenomena of globalization and its components: politics, economics, and cultural, which are essential to comprehend how relations are integrated between the Nations and the people involved. As a political process we can identify that ‘... each time it is less determined within isolated units, that is, within the hierarchically organized and relatively autonomous structures that we call States; rather, it stems from a complex series of multi-level games that are played in fields of many institutional layers, not only in the interior but above and across state borders’ (Cerny, 1997, p. 253).

Faced with these changing circumstances, States relations have taken two basic forms of action: at the level of individual unity, it is viewed as a ‘competitive State’ (Cerny, 1997) and at the collective level, it is seen as an entity of ‘governance without government’ (Rosenau, 1992), as with the establishment of a framework of international organizations it seeks to establish criteria of common action homogeneity in the formation of states.

Among the supranational agencies involved in the installation of *governance without government* are the International Monetary Fund (IMF), the World Bank (WB) and the Organization for Economic Cooperation and Development (OECD), which are driven by ideological preferences developed as “orthodox” responses to the problems posed in rich countries, and by changing circumstances in the global economy. This common ideology has received diverse labels, which can be found summarized in the ten characteristics of the *Washington consensus* that John Williamson identifies (1993), these include: fiscal discipline, public spending priorities, fiscal reform, competitive exchange rates, financial liberalization, trade liberalization, foreign direct investment, privatization, deregulation and property rights. Aspects that together constitute the preferred ideological filters that shape the guidelines in national policy decisions. Thus, identifying that the educational systems of different countries (Zabala, 2014; Reimers & Chung, 2016) are having *structural coupling* to redefine educational practices from the complex global system.

Before continuing with the exposition of the components previously mentioned, it is important to clarify that, according to the analysis of the social systems developed by Niklas Luhmann, the double contingency in the treatment of complexity requires the coupling of its structures (*structural coupling*) that are adequate and flexible enough to allow the making of decisions that do not unbalance the system (Torres, 2004).

From these premises, we can analyze how external (supranational) policies can be interpreted and operated differently in diverse countries, even at the organizational level, where the impact is more direct.

Relationship between decentralization and school autonomy

One of the most evident aspects that has emerged from supranational visions is that most OECD countries are adopting policies with similar trends, which undoubtedly presents a process of *isomorphism* within the organizational field, that are obtained through the assumption of common institutions, that allows reduction of the uncertainty in the relations between organizations. That is, if we consider that *isomorphism* refers to ‘a limiting process that forces a unit in a population to resemble other units that face the same environmental conditions’ (Di Maggio & Powell, 1999, p. 108), we can mention that since the early 1980s, *new public administration* structures have emphasized *decentralization*, *school management autonomy*, shared decision-making, results-based evaluation and school choice. Factors that have become the predominant school governance approach in many countries and have significantly altered education systems (Mulford, 2003). The reason behind these governance approaches is that autonomy and accountability can respond more effectively to local needs.

This is how the OECD countries have increased decision-making authority at the lower levels of education systems. Educational decentralization of decision-making can be implemented in a variety of ways, because it involves delegating responsibilities to the school, or at intermediate levels such as state, provincial, and local education authorities (OECD, 2004). Therefore, Glatter et al. (2003) distinguish two models: local empowerment and school empowerment (or school autonomy).

For reasons of space and emphasis on the thematic axis of the presentation, we deal with the second model, which refers to the devolution of responsibilities. In other words, ‘transferring decision-making powers to schools has been a main objective of the decentralization and restructuring reforms since the 1980s’ (Pont, 2009, p. 24). Where it is argued that in contexts of greater school autonomy, school leaders fulfill responsibilities that require specialized knowledge, however, often this is not acquired through formal training.

In highly centralized systems, such as the case of Mexico, decisions are still made at the national or state level, the work of the school leader remains confined, rather narrowly, to apply the policies decided at superior administrative levels to a reality for teachers and students, leaving aside the possibility of empowerment of school actors.

Dissemination mechanism, as an example of the external effects in the formation of educational policy

If we take the external *mechanisms* as an analysis reference in the formation of educational policies, developed by Roger Dale (2007), we can identify how they influence national education policies, and how they can relate, but not exclusively, with globalization, as part of a ‘globalizing effect’.

Dale identifies five mechanisms, understood as the expression of the different forms in which the Globally Structured Educational Agenda (GSEA), which are: harmonization, dissemination, standardization, installation of interdependence and imposition.

In this space, we only deal with the *mechanism of dissemination*, since it is identified with the transfer of policies that allows discussion of the autonomy of school management and its incorporation into the educational agenda. An illustrative example is the role of the OECD, as a supranational body, which in most of its documents focuses on leading the destinies of member states towards the definition of educational agendas with specific directions.

For the Mexican case, the *Mexico-OECD Cooperation Agreement* focuses on improving the quality of education in schools, where two specific recommendations are made:

... *First, to increase school autonomy, to professionalize leaders and hold them accountable, for which, it is necessary to participate in the key decisions that occur in their school, stories such as hiring or dismissing teachers. Decision structures that fit their school contexts can also have a positive impact on their performance.*

... *Second, guarantee funding for all schools; in practice, schools have almost no autonomy or funds to allocate to their priorities, and there is a disparity in the resources available to schools in rich communities and poor communities. The distribution of resources must be equitable, avoiding difficult bureaucratic burdens for schools* (OECD, 2010, p. 7).

For this policy transfer mechanism, the development of national indicators for and from education systems is overriding; for example, for *school autonomy over resource allocation* the OECD proposes: *a) selection of rental teachers, b) dismissal of teachers, c) establishing teachers' initial salaries, d) determining teachers' salary increase, e) formulating school's budget, f) the decision on budgetary allocations within the school* (OECD, 2013, p. 131).

For the OECD (2011), countries where schools have greater autonomy with regard to teaching subjects and how students are evaluated tend to perform better. Therefore, according to this organization, those with less autonomy have lower yields. This is complemented by the perception of Wößmann (2005), for whom school autonomy or the decentralization of decision-making, is to delegate tasks to schools so that they are the ones who oversee carrying out the tasks that facilitate the student learning. For that, the *economic models of school administration (governance)* have demonstrated that the greater the autonomy of schools, the greater the efficiency with which they work (Nechyba, 2003).

Once the school management autonomy policy is inserted in the global and national agenda, it is necessary to understand what happens during its implementation in the arenas of political struggle.

Role of the veto players in the definition of the autonomy of school management

The concept, *veto players*, provided by Tsebelis (2002), allows to explore the impact that the different political institutions have on a public policy, in this case, the autonomy of school management. The results of the different political systems, understood as legislative production, depend on the preferences of the actors involved in the decision, as well as on the institutions in which they interact. To change the legislative *status quo* requires the agreement of several actors, individual or collective, which varies from one political system to another.

These actors are called *veto players* and may be defined by the political system, for example, the *Pacto por México*, a Mexican national political agreement signed on December 2, 2012 by the President of the Republic and the three main political parties of Mexico, in which among others, we identify *1. Agreements for a society of rights and freedoms*, which on axis 1.3, *includes education with quality and equity*, which in its commitment 9 says:

Management autonomy of schools will be strengthened with the aim of improving their infrastructure, purchase educational materials, solve basic operating problems, and foster participation conditions so that students, teachers and parents, under the leadership of the principal, become involved in the resolution of the challenges that each school faces (Pacto por México, 2012, p. 5).

These *veto players* can also be defined by the Constitution, as it happens when we review the third article, reformed in 2013, estates:

To strengthen the management autonomy of the schools before the corresponding orders of government with the aim of improving their infrastructure, purchase educational materials, solve basic operational problems and foster participation conditions for students, teachers and parents under the leadership of the principal, to become involved in resolving the challenges facing each school (DOF, 2013, p. 4).

For Stein *et al.* (2006), the political system and the Constitution, only conceal the real *veto player* -the executive-, who is manipulating the issue of management autonomy with the improvement of education as part of a broader work program of modernization and development to maintain global political stability, where ideologies play a role to influence modernization and efficiency.

A second *veto player* are the unions, who argue for 'security in employment, creation of teaching positions, control of appointments and functioning of the educational system (captive), maintenance of bargaining power at national level, better wages' (Stein *et al.*, 2006, p. 247). This player is usually characterized by labor and left ideologies. For example, the Sindicato Nacional de Trabajadores de la Educación [National Union of Education Workers] (SNTE), does not manage a uniform position in its message in relation to the autonomy of school. That is, for the former leader, (Prof. Gordillo, who remained in the union leadership for about twenty-four years), the union organization identifies a set of risks and limitations when talking about strengthening the autonomy of management of schools:

It is an old strategy driven by various business organizations and political formations [...they quote Smith (1993)], the reality was that schools ended up fighting each other, competing for resources and students; schools specialized in the resolution of standardized measurements; there was a disloyal competition between teachers, since they were remunerated on the basis of not-quite-clear criteria that showed their production, and the students' evaluation was carried out according to uniform criteria, without considering the disparities. The immediate effect of this so-called 'management autonomy' will be to transfer to school the tensions and discomfort arising from serious budgetary constraints on education (SNTE, 2013, p. 6).

However, when the new leader assumed the coordination of the SNTE, the message changes, instead of questioning, it now supports such a policy; a total *alignment* and *isomorphism* that is directed to the organizational modification of the Mexican schools is identified:

... strengthen the management autonomy of schools through the recognition of parents' support and representation agencies by government bodies, society and citizens' organizations (SNTE, 2016, p. 12).

However, the dissidence, represented by the Coordinadora Nacional de Trabajadores de la Educación [National Coordinator of Education Workers] (CNTE), argues that education in Mexico is being privatized when they say:

... this legislation opens the door so that, in the name of autonomy, and under the pretext of involving the parents in the management and maintenance of schools, the fees are legalized, allow companies to enter schools so that the constitutional precept that guarantees the free public education becomes a death letter. That has a name: privatization (CNTE, 2013, p. 6).

A third *veto player*, as proposed by Stein *et al.*, are the *subnational actors*, who seek to 'create and/or expand opportunities for political influence, obtain votes, avoid unfunded mandates or limits on discretionary spending, improvements in the local economy in the context of interjurisdictional competition' (Stein *et al.*, 2006, p. 247). Among them, the civil association *Mexicanos Primero*, that in its publication *Metas. Estado de la Educación en México 2011* [Goals. State of Education in Mexico 2011], establishes as Goal 5: Schools with autonomy and parents participating:

To achieve in 2015 the formal recognition of the legal identity of each school, with sufficient powers to specify the management mechanisms and articulate with the certification of standards by the Federation and the work assignment of teachers by the states; to achieve, as from 2016, a socially agreed national policy on Social Participation that specifies ways of action, complementarity and mutual strengthening between parental associations, participation councils and civil society organizations; By 2019, count with a comprehensive and functional system of accountability for educational outcomes of each school. The school is placed at the center of the system, it has an explicit budget ceiling, it generates the conditions for teaching and management positions to take root in the school, management shared with parents is both support and surveillance of resources, processes and results, the whole system functions in frank dialogue with the expressions of civil society without closing to the binomial authorities / union (Calderón, 2011, p. 46).

Conclusion

The discourse of the institutional autonomy of educational establishments is closely related to that of the quality and freedom of choice of education. It is not so much a question of increasing resources, but rather of managing better and, above all, establishing competition between schools. For this, nothing better than giving autonomy to schools, so that they can compete with each other for the students. The problem is not in institutional autonomy, but in the means and limits.

If conditions are not created for the construction of a true pedagogical, economic and administrative autonomy, the public schools will not be able to generate the conditions for the development of a quality education, nor will they be able to contribute to the formation of autonomous citizens capable of transforming the conditions of inequality existing in the country, or at least achieve the empowerment of educational actors as it is preached in the speech.

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Prof. Dr. Amelia Molina García, Universidad Autónoma del Estado de Hidalgo, México,
meluxmolina@hotmail.com

PhD Student José Antonio Sáenz Melo, Universidad Autónoma del Estado de Hidalgo, México,
antoniosaenz9@hotmail.com

Prof. José Luis H. Andrade Lara, Universidad Autónoma del Estado de Hidalgo, México,
luislara24@hotmail.com

Claudio-Rafael Vasquez-Martinez, Felipe González-Gonzalez, Francisco Flores, Josefina Díaz, Jose-Gerardo Cardona-T., Hector Rendon, Jorge Chavoya, Sandra-Milena Gutiérrez-Cardenas, María-Ines Álvarez, Joaquín Torres-Mata, Erik-Moises Betancourt-Nuñez, María Morfín, Miguel Álvarez, Carlos Anguiano

The Reorganisation of the Curriculum in Educational Cycles in Codema College: A Positive Step

Abstract

The policy of reorganising schools in pedagogical cycles has been restored little by little in the state schools of the city of Bogota. This reform began in the year 2008 in Codema College, which faced a number of challenges, personal as much as institutional. The reform depended upon the participation and engagement of the educational community in the reform process, and for that reason, this paper presents a positive view of the school reorganisation in relation to the theme of cycles, to balance some of the views that have been expressed previously.

Keywords: reorganisation, curriculum, educational community

Introduction

During the last two government administrations of the city of Bogota education has been made a priority, starting from 2004 to 2008 with the regional plan, *Bogota without indifference*. This plan focused on concrete actions for school communities that addressed some of the problems facing schools: feeding the school children; better physical conditions for students; and thus optimising school performance. Later the reform moved on to reorganise schools in pedagogical cycles, which was one of the projects under the banner of the sectoral plan, *Quality education for a positive Bogota* (2008-2012), which was proposed as a response to the need to promote high education in the Capital District.

The order of priorities of the Sectoral Plan 2008-2012, *Quality education for a positive Bogota*, is clear, namely to improve the quality of education. To achieve this, certain actions were proposed that could turn the project into reality. These were to update the training programmes and to transform the school organization and teaching methods. All this was to fulfil the purpose of having excellent schools and well educated young people with respect of the values and principles of society.

In this sense, the Programme of Quality and Relevance of Education, had, as a fundamental intention, to transform educational institutions pedagogically, to change pedagogical practices and conceptions, in order to implement the programme, *Tools for the Life*, and to reorganise the curricula in educational cycles in the 370 schools of Bogota. This implies that the processes of education should centre on learning, recognising the peculiarities and needs of adolescents and young children during the

different stages of development, providing the conditions that facilitate access to knowledge in a holistic way.

The development of the process of curricular reorganisation

To stimulate the development of the process of curricular reorganisation in cycles, together with the programme of *Tools for Life*, the Secretary of Education of Bogota designed a methodological and conceptual plan that consisted of the following phases:

- I. Preparation: in which the proposal was discussed and awareness raised, and the conditions of time and space were created to initiate the support process;
- II. Formulation: in this phase all the processes in relation to the redesign of curricula in cycles was planned;
- III. Implementation: in this phase the processes planned in the formulation phase were executed; and
- IV. Follow-up and sustainability: during this phase actions were designed and executed that guaranteed the sustainability of the process of reorganising the curricula in educational cycles.

It is clear what was being attempted here, the Secretary of Education called on the educational community, and its response confirms the point made by Navarro: 'The implementation of educational policy is a complex task. It generally demands that numerous educational actors participate; central and local directors, students, supervisors, bureaucrats and parents or, at the very least, that they do not actively oppose. It is very important to take into account specific data on local conditions that affect the operation of the system. Concretely, to decide whether decision made centrally applies in practice to a certain locality is a far-reaching task' (Navarro, 2006, p. 12).

At this point, it is possible to affirm that Codema College, provides the case study for this paper, the development of this process of pedagogical and curricular construction could count upon the participation, the will, the autonomy and the educational commitment of the local directors of education, managers, and, in particular, teachers, students, and parents, which is to say the whole educational community. The work developed in the school began with concrete, collective agreements, which allowed for ownership of the process, and the gradual introduction of true pedagogical transformations.

It is relevant to note that, although today the balance of the implementation of the policy of cycles in Codema College is positive, in the beginning of the process there was disagreement on the part of the teachers. They were the first group called upon to own the process, and there was great confusion produced by their fear that this involved reframing their pedagogical practice and their educational functions, as well as modifying the principles of school organization that had existed since time immemorial. However, little by little, with the effective work on the part of working parties and the leadership of the process of adaptation, the attitude of the educational staff over the last three years has come together in such a way that today Codema College is one of the most advanced institutions in the locality in terms of the development of levels.

Process of collective consultation

To develop the processes of collective consultation during the promotion of this reform, it was necessary to create and to reinforce local and institutional organisations by for example, meetings with the teams, where the attending teachers were persuaded that their participation in the creation of a school environment that was relevant to their specific context, and which was the centre of many dynamic social relationships would be a positive step. While the curricula were being redesigned in cycles, higher education institutions and other educational institutions were contracted as consultants to support the school on site. This had the purpose of tying the academy into this process of transformation. The whole process took place under the leadership of the office of the Undersecretary for Quality and Relevance in the Secretariat of Education of Bogota. The Local Quality Team, the University de la Salle and the Academic Councils were all involved in the school, as well.

There were constant meetings between those who worked in the school and the academic advisors and consultants, where those who attended took part in the network engaged in reforming the curricula into cycles, and there was an interchange of ideas about local implementation. This resulted in the benefit that the teachers absorbed this new idea and took part in the process of construction in the school.

From the point of view of high quality education, the project of curricular reorganisation in educational cycles in Codema College took for granted, as a pedagogical principle, that centring the reorganisation on the stages of human development, and recognising the participants as integral human beings, with capacities, abilities and mastery that must be developed. This was essential for individual and social development and guarantees the quality of the educational outcome. This approach involved the whole school organization, trying to give responses to the daily questions, including: What to teach? How to teach? and How to evaluate? This was an open attempt to take into account the coherence of the socio-cultural context and the characteristics of the children and young people, in their different stages of development.

The reorganising of curricula in educational cycles

The reorganising of curricula in educational cycles is a different way to think, feel and operate the school. It organises the processes of education and learning from the perspective of valuing the young people, while offering the possibility of learning through pedagogical strategies that respond to their interests and needs and the demands of growth in the educational context (Ramirez, 2011). It would be useful to have some examples here of what pedagogical strategies were tried out and how they had changed from previous approaches.

This educational policy has made real and positive contributions to improving the conditions of life of the population, making education a democratic, participatory exercise of social development for each and every citizen. Consequently, the organization of education in cycles is a strategy to make a school more relevant to daily life, and has turned Codema College into a space of constant investigation and research, that has taken the reconstruction of the curriculum as an

area of research and participation, where the teachers and students become researchers and the object of research.

From this perspective, it is worth considering the work of Gajardo (2003) and his classification of the factors that have contributed to reducing school drop-out, and how Codema College demonstrates a good balance in the work that is being carried out:

- a) The increase in the pre-school enrolments, which has improved the success of children in the first years of primary and has reduced repetition, one of the main factors that affects early drop-out from school;
- b) The change to systems of automatic promotion during primary education, or at least the early years, which has reduced the number of over-age pupils, a factor strongly associated with school drop-out;
- c) The introduction, extension and, in some cases, better focusing of programmes and subsidies designed to improve school retention (scholarships, free school materials, programmes of school meals, and others);
- d) The improvement of the school infrastructure and the availability of quotas;
- e) The greater involvement of parents and the introduction of incentives to participate in activities of the school and following the school progress of their children, and of their results. This has led parents and the students themselves, to place a higher value on education as the single or main source of capital capable of improving their chances of access to urban employment (Gajardo, 2003, p. 2).

Up to now, we have looked favourably on the reorganisation of the school into cycles. Now we will explore the meaning of that reform in more depth so that it can be understood better. The Secretary of Education District (SED) adopted a programme that organises the school into five educational cycles, involving the redesign of the Institutional Study Plan (PEI) in their pedagogical and curricular organization, as well as its school organization and administration.

In Codema College a cycle is understood to be, 'the set of conditions and programmes, of intentions and strategies, of pedagogical and administrative resources, integrated and articulated with each other, so as to develop a time unit that includes several levels of difficulty, and within which the students can advance with more flexibility until reaching the objectives of the programme at the end of each cycle, which are linked to the aims of the education embodied in the General Law of Education' (Ministry of National Education, 2006, p. 5). Since 2008 this public policy has been implemented, and has demanded continual reflection on the state of educational practices, their characteristics, advances, difficulties and perspectives.

In line with this thinking, the main actions that have been undertaken in the institution are: the study of the sectoral plan for education, and specifically the pedagogical reorganisation in cycles; the implementation of phases 1, 2, 3, and 4 of the reorganisation in cycles; the evaluation of the students in relation to cycles; and, the adoption of specific projects for each cycle defining the character of the cycle (characteristics of the young people, and of the teachers). These actions guide the progression of the processes to develop the students in each cycle.

Pedagogical strategies have also been adopted to fit the cycles. Curricular guidelines orient the pedagogical process in the cycles. Socialisation into the educational community is integral to the cycles. The Institutional System of Evaluation (SIE) was adopted, following the guidelines of the Institutional Study Plan (PEI) for the reorganisation in cycles. Academic duties have been reorganised in line with the cycles, and the processes of academic and administrative support have been realigned with the cycles (Coordination by cycles).

There have also been adjustments to the school timetable, according to the introduction of cycles, involving the creation of official times for teachers' meetings, again organised by cycles, as well as the creation of local and institutional in-service training days, qualification and update of teachers through local meetings, courses, seminars, pedagogical days, and cycle meetings.

The implementation of pedagogical activities has reinforced the cycles, for example in terms of the pedagogical outcomes, team work and inter- and cross-disciplinary projects have been established. Curricular design is discussed in relation to cycles. The design of school and family support processes and improvement functions according to the dynamic that the reorganisation in cycles demands. The didactic discussion on trends, models and approaches is geared to the pedagogical reorganisation in cycles. The discussion on the organization of the education processes and learning by cycles has led to a rethink of the educational concepts on the part of the teachers, and also the students. This means that school dynamics revolve around the category of cycles in the institution.

In the processes discussed here, the school has depended on the continual support of the SED at a central and local level, with support of teachers and educational managers, and the coming together of the various organs of school government, including the Senior Management Team, Academic Council, Parents Association, as well as the Student Council. The process has also had the regular recommendations of the Commissions on Evaluation and Promotion.

Conclusions

The institutional effort has led to the reframing of many of the practices that, over the years, have constituted the daily routine of the school, and an educational ideal is being constructed that transforms education in the school, makes it possible to offer a high quality education that is relevant to the demands of the times and of the community, a human education where it is clear the young people are at the centre. This reminds us that, 'Before too much importance was attached to what was taught; today we need to discover what type of professionals and citizens a society needs' (Rivero, 2000, p. 104). The result is a school where the pedagogical relationships that have governed the school throughout time are altered.

Finally, it is possible to affirm that the curricular reorganisation in pedagogical cycles plays a central role in the generation of reforms that can be implemented in practice to promote the autonomy of schools and educational decentralisation. The transfer of pedagogical and curricular decisions moves them from central government to the school (García-Huidobro, 1999). From this perspective, learning, and the ways in which it can be optimised, through close collaboration with the agents who participate in it is made the centre of the educational process (Guzmán, 2004). This school finds itself facing a true transformation, where attendance,

contribution, participation and commitment are expected, to meet the standards of the educational community which is Codema College.

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Prof. Dr. Claudio-Rafael Vasquez-Martinez, University of Guadalajara, Mexico,
crvasquezm@gmail.com

Part 4

Higher Education, Lifelong Learning & Social Inclusion

Sharon Thabo Mampane

Training Middle Managers of South African Public Schools in Leadership and Management Skills

Abstract

The purpose of this conceptual explanatory research is to highlight the importance of training of Middle Managers or Heads of Department (HoDs) in leadership and management in South African public schools. Leadership responsibilities in schools are becoming more complex to the extent that principals can no longer be sole leaders in schools. The achievement of effective teaching and learning through leadership and management generally requires middle-level leaders such as heads of departments or subject leaders, to be trained. It focuses on “why” or “what caused” HoDs in schools to be trained in leadership and management. HoDs are former class teachers promoted to the role of supervising other teachers so their training and guidance about leadership and management skills by more experienced facilitators, may equip them with updated abilities, interests and knowledge for teacher leadership. Training facilitators guide HoDs who may not possess such skills, through formal training. The identified topics, aims and objectives, content regarding theoretical knowledge, practical skills to be acquired, attitude towards work and the necessary support materials were used in the presentation and these encouraged an interactive participation and engagement throughout the training process. The leadership and management programme was helpful in identifying what should be taken into consideration for leading and managing teachers and learning tasks. The skills developed by HoDs would assist them in producing a pool of highly qualified and committed teaching workforce in the field of education. A number of approaches were suggested for HoDs to increase their ability to act effectively and authoritatively based on ability and competence.

Keywords: Heads of Department, leadership and management, teaching and learning, teacher supervision, facilitation, teacher development, support

Introduction

This conceptual paper explores frameworks and innovative ways of supporting lifelong learning through school middle management training in leadership and management. The purpose of the paper is to highlight the importance of funding the training of HoDs in South African public schools because people are the main assets of schools. Leading and managing departments/phases and teachers in public

schools requires developing a highly skilled workforce (Crane & De Nobile, 2014). With the onset of the democratic era in South Africa, devolution of responsibility to schools and the growth of school-based management have impacted upon the role and workload of the team of school leaders (Swanepoel, 2008). Schools operate within a legislative framework set down by national, provincial or state parliaments and one of the key aspects of such a framework is the degree of decentralisation and changes in the educational system (Bush, Joubert, Kiggundu & Van Rooyen, 2010). These demands on education leadership are difficult tasks HoDs can perform since most HoDs from former disadvantaged public schools in South Africa lack experience and training in supervising teaching and learning in schools (Swanepoel, 2008). Therefore it is essential that training in leadership and management be part of lifelong learning for leadership and management excellence in schools.

Schools are important organisations in any educational system and therefore require experienced leaders with a positive attitude and the ability to create a school environment that encourages cooperation and communication among staff members, education stakeholders and learners. Leadership and management also impacts on how teachers teach and are managed in schools. A solid leadership is the most essential key to school success, thus the need to capacitate HoDs with leadership skills to bring the school into success. HoDs are middle managers and the term ‘middle managers’ is used to describe individuals who are in formal roles of responsibility and who form the middle leadership level in schools. In recognition of the increasingly important role they play in schools, recent literature has been referring to them as middle leaders (Gurr & Drysdale, 2013; Koh, Gurr, Drysdale & Ang, 2011), however in this chapter, the term ‘Head of Department or HoD’ will be used. Excellence in schools can only result from quality teaching and learning acquired through effective leadership and management (Kruger, 2003). HoDs with good leadership and management skills develop self-confidence and are able to improve performance during teacher leadership.

Professional development of HoDs in schools

Professional development of teachers is a priority that should be well managed for school performance to improve. Equipping HoDs in leadership and management skills may result in lifelong learning, personal development and professional development. The acquired knowledge should help improve schools, and most importantly, learner performance as well as maintain a high standard of teacher leadership and supervision (OECD, 2009). Therefore, all organisations should ensure effective teaching and learning takes place through leadership and management, using a sensible blend of tools, methodologies and approaches. Staff development should be an ongoing process carried out because of the needs of professions/occupations, citizens, and societal changes (Mizwell, 2010). The end result should be qualified leaders who are talented, determined, knowledgeable and capable.

HoD training for leadership in education was first conducted in October 2015 in the Mpumalanga Province for 10 days with 150 participants. All selected participants engaged in class teaching matters and were responsible for the effective functioning of their departments as well as organising relevant extra-curricular activities to ensure the subject discussed promoted learner education in a proper

manner (Kruger, 2003; Bambi, 2012). The facilitators involved in the programme had subject matter expertise in Leadership and Management; and they executed clear planning for the development and/or finalisation of the training through additional materials (power points, case studies, role plays, practicals, etc.) necessary for the module. The training highlighted the importance for all organisations to ensure effective leadership and management focusing on teaching and learning, assessment of teaching, implementation of the law and policies and educational administration matters in schools, at all levels of education. It was also deemed helpful to identify what should be taken into consideration for support of teaching and learning tasks. Training addressed the needs of HoDs and societal changes. The expert facilitators' core purpose was capacitating HoDs with leadership and management competence in education.

During the training of HoDs the starting point was to enable HoDs to lead staff and students to achieve common goals. Long term skills would be a continuous and indefinite establishment of relationships. Formal training of HoDs involved problem solving and hands-on activities about leadership and management to equip HoDs with skills to address practice based issues in the school environment. The identification of the learning goal was the starting point and training focused on leadership and management support for the achievement of set goals and accountability for actions (Borko, 2012; ACME, 2002). Current constraints were challenged while new possibilities were explored to ensure accountability and support for the achievement of goals and for sustaining development (Clutterbuck, 2011). The facilitators used various core skills and were able to create rapport; paying attention to content and process; keeping an open mind; reflecting on development issues; asking and probing questions; and identifying limiting assumptions and beliefs to be able to give and receive feedback (Clutterbuck, 2011). Relationships built developed into friendship. Trained HoDs may later become expert leaders to newly appointed teachers in schools.

The preparation and training gap that exists in the leadership and management of HoDs was addressed through extensive discussions about importance of leadership and management. Individual and group presentations encouraged the different participants to discuss the ongoing controversy over what constitutes leadership and management to support teaching and learning. During such interactions, a relationship of trust and collaboration developed (Borko, 2012). Throughout the training, the focus was on identified topics, aims and objectives, content regarding theoretical knowledge, practical skills to be acquired, attitude towards work and the necessary support materials to be used in the presentation of leadership and management. Training materials and needs were adapted to the local situation in line with the changing requirements, and consideration was given to work related developments.

Participants' roles and responsibilities included managing the curriculum in compliance with applicable legislation, regulations, ELRC resolutions and Personnel Administration Measures (PAM). The selected participants had no prior training on leadership and management so the teaching philosophy adopted was a learner (adult) centred approach. The teaching approaches used were community of inquiry requiring a social and cognitive presence; mastery of learning entrenched through instructions, assessment, feedback; and corrective procedures. The participants were

grouped in teams to encourage peer assisted learning through learner engagement and collaborations. The experts facilitated the training process using resources such as data projectors, laptops, worksheets, study guides, readers and links to articles on leadership and management. At the end of the 10 days' training, all participants were evaluated in leadership and management skills to assess the achievement of outcomes.

Leadership and management by HoDs

The concepts leadership and management, though used interchangeably in South African school context, studies show that they are different (Bush, 2008; Christie & Lingard, 2001). Leading and managing are distinct, but both are important for influencing people, working with people and for the achievement of common goals. These goals if shared by leaders and their followers are achieved more effectively and easily because followers and leaders work together (Yukl, 2006). The influence process is purposeful in that it is intended to lead to specific outcomes of being able to lead and motivate the actions of others to achieve certain goals by taking initiatives and risks (Kotter, 2010). Leadership and management are different in that, managers though willing to work with people to solve problems, do so with minimal emotional involvement while on the other hand; leaders are emotionally involved and seek to shape ideas instead of reacting to others' ideas (Kotter, 2010). The central concept is influence rather than authority but both are dimensions of power.

HoDs develop the ability to enforce policy during their leadership of teachers while giving support to teachers' areas of need. Both leadership and management are important because schools require the objective perspective of the manager as well as the vision and commitment that wise leadership provides. Managing teaching and learning should be a practice concerned with the agreed operations of educational organisations and Bambi (2012) states that management activities should be directed towards efficient and effective utilisation of organisational resources in order to achieve organisational goals. Therefore the achievement of educational aims must be purposes agreed by the school and its community. Caution is made against organisations which are over managed but under led because they may eventually lose any sense of spirit or purpose and crash shortly thereafter.

The quality of leadership is what makes a significant difference to school and learner achievements in many parts of the world, including South Africa. Schools require effective leaders and managers if they are to provide the best possible education for their learners (Bush, 2008). HoDs as teacher leaders play a dual role function; they are teachers as well as leaders/supervisors of particular phases and subject areas in the schools. Gary Yukl (2006) defines this leadership as "the process of influencing others to understand and agree about what needs to be done and how to do it, and the process of facilitating individual and collective efforts to accomplish shared objectives" (Yukl, 2006, p. 8). Bush (2008) has argued consistently that educational management should be centrally concerned with the purpose or aims of education. Therefore HoDs' engagement in class teaching are being responsible for the effective functioning of the department and organising relevant/related extra-curricular activities to ensure that the subject/learning area or phase and the

education of the learners, should be promoted in a proper manner (Kruger, 2003; Bambi, 2012).

HoDs should shape the goals and motivate the actions of others by initiating change to reach existing and new goals. Therefore their training in leadership and management should influence others' actions to achieving components central to the phenomenon of leadership (Crane & De Nobile, 2014). While we can distinguish management from leadership conceptually, in reality we often find the two roles coexisting in the same positions and the same person. Teacher leadership also 'coexists' in one person because teacher leadership roles have been performed by teachers who are responsible for teaching as well as providing leadership (Bambi, 2012).

The role of Heads of Departments in schools

Globally, HoDs are perceived as resource providers, administrators, monitors, liaison officers, managers, department representatives, communicators and mediators (DBE, 2011). HoDs or phase and subject leaders are teachers with knowledge of the subject area, and are responsible for managing teachers and subjects in the grades and across the phases (DoE, 2000; DBE, 2011). Their roles and responsibilities also include managing the curriculum in compliance with applicable legislation, regulations, Education Labour Relations Committee (ELRC) resolutions and Personnel Administration Measures (PAM). Therefore, both leadership and management are expected from the same individual (Day, Harris & Hadfield, 2001). As teacher leaders they are accountable for teaching and learning outcomes whereas previously their accountability was for input into learning processes only (Loius et al., 2010). HoDs also have to coordinate intervention strategies as well as approaches within the subject department to ensure teachers teach accordingly.

The recognition and importance of HoDs has led to increased attention to preparing them, not only as individual leaders, but also on the context in which they work, to best use their leadership competencies to improve learner performance (McCauley & Brutus, 2011). Acquisition of this powerful source of learning for enhancing leadership skills requires HoDs to know far more than they already do. Key to HoD leadership is teacher development for organisational success and improvement emanating from HoD teaching and leadership competency (Gurr & Drysdale, 2013). For HoDs to acquire competency, they require support and guidance in leadership and management to enhance their teacher support skills. Therefore HoDs should be "hands-on" leaders, who engage with curriculum and instruction issues; are not afraid to work directly with teachers; and are involved in teaching themselves (Hornig & Loeb, 2010).

Methodological approach

This conceptual research focuses on the concept or theory that explains or describes the phenomenon Middle Managers Training on School Leadership and Management in South African Public Schools. The term HoDs or 'middle managers' refers to individuals who are in formal roles of responsibility and who form the middle leadership level in schools (Hannay & Ross, 1999; Wise, 2001). Heads of

Department (HoDs) are phase and subject leaders. In recognition of the increasingly important role they play in schools, it is important that middle leaders be trained, developed and supported with leadership and management skills to manage teachers and the constant changes in curricula (Gurr & Drysdale, 2013; Koh, Gurr, Drysdale & Ang, 2011; Turner & Sykes, 2007). In order to manage and supervise teachers they have to have knowledge of the subject area, and manage teachers and subjects in the grades and across the phases (DoE, 2000; DBE, 2011; Sharitha, 2013). They coordinate intervention strategies as well as approaches within the subject department to ensure that teachers teach accordingly (Louis, Dretzke & Wahlstrom, 2010; Louis, Leithwood, Wahlstrom & Anderson, 2010). All these skills require innovative ways of support and training. Training HoDs should be part of lifelong learning for solving problems of non-preparation and lack of training in leadership and management.

Implications for practice within the South African context

Different HoDs have different needs based on their leadership experience, knowledge, skills, and expertise. In most cases formal leadership training may prove to be of necessity while in other cases HoDs may possess some knowledge of leadership and management from having acted in such a position. Most newly appointed HoDs struggle to manage issues related to teacher supervision, and such HoDs appreciate development in leadership and management to become effective in teacher and learner supervision. This means school leaders have to explore the full potential of the HoDs before organising the leadership and management training, to help support HoDs for teacher supervision in schools (Feilden, 2005). All HoDs, in the training programme, experienced and inexperienced, face different teacher leadership and supervision challenges because of the constant changes in: the curriculum, the new instructional methods, the advances in technology, the changed laws and procedures, and learners' learning needs. This means that being in the HoD position does not necessarily mean HoDs have required skills and capabilities of leadership and management. Every new position requires keenness to learn and develop. Therefore it is important that HoDs take advantage of training related to teacher supervision to become better at what they do as well as become indispensable to the employer (Clutterbuck, 2011). Through professional development HoDs may experience better and more rewarding working days because of the acquired expertise, a key quality of an effective leader. Feedback given during training sessions regarding leadership and management skills brings in new knowledge while different experiences of addressing challenges gives HoDs the opportunity to talk about their professional development (Feilden, 2005) and to share how they have improved in expertise and work abilities (Mizwell, 2010).

Conclusion

This paper makes a contribution to the understanding of the importance of funding the development of HoD leadership and management skills for a more effective teacher commitment. The study found that the acquisition of leadership and management skills for effective teaching and learning by HoDs were positively related to improving learner performance and teacher commitment. This means that

improved leadership behaviours may result in improved teaching and learning, teacher motivation and individual commitment. The more empowered the HoDs are in leadership and management skills, the better the performance in schools. Leadership and management play important roles in determining levels of commitment of the teachers in the particular school. This study suggests that funding should be provided for HoDs to be trained to provide guidance, information and expertise through leadership and management. The aim is to accomplish the core business of the school, namely, effective teaching and learning. There is a need for more leadership and management training programmes to improve performance in schools through effective leadership and management. HoD leadership and management skills might be an effective strategy to boost teacher's commitment towards effective teaching and learning in the school, thus, the emphasis on specific and sustained attention to the development of HoD leadership skills, as a central part of the wider teacher's development agenda. Trained HoDs will help the schools to practise suitable leadership style in order ensure teachers are committed and responsible in their work.

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Dr. Sharon Thabo Mampane, University of South Africa, South Africa, mampast@unisa.ac.za

Hanna Kim

The Higher Education Policy of Global Experts Recruitment Program: Focused on China

Abstract

There is an increasing interest in how to train and use national experts around the world. Major advanced countries are putting their national efforts into attracting global experts overseas and preventing domestic experts from flowing out of their countries. China has also endeavored much to attract global experts for its economic development and the global expert recruitment plan has passed a distinctive development process, which was different from that of western countries, since its aim was to maintain and develop its socialist economic system. After the Reform and Openness Policy began in 1978, China regarded global experts recruitment as one of the most important elements for strengthening its national competitiveness and has implemented various initiatives to attract global experts from foreign countries, one of which being the implementation of the Recruitment Program of Global Experts at both central and local governmental levels. Based on our findings, this research suggests policy implications in terms of the major tasks for establishing and pushing forward the Global Expert Inducement Policy of world.

Keywords: Recruitment Program of Global Experts, global expert inducement policy, higher education, China

Introduction

The time has come that the intangible factors of production such as technology, idea, and intellectual property create more added value than the traditional factors of production such as labor, production equipment, and raw materials in industry. Every country is concerned about how to minimize 'Brain Drain' in this situation that the flow of human resources is rainless and in particular, there is an increasing interest in how to foster and utilize national talents. Accordingly, major advanced countries are making every effort in a political way to attract overseas talents in order to respond to the supply and demand of talents in this era of internationalization and prevent their own talents from leaving their own country.

China has also made a lot of efforts to attract overseas talents for its economic development. Particularly in case of overseas-talents-attraction plan, China went through a different unique development process because it aimed at maintaining and developing its socialist economic system. China's reform policy started in 1978 became a major catalyst for its economic development and to achieve this, required more highly qualified professionals. They wanted to solve this problem by attracting overseas experts. However, China's initial overseas-talents-attraction policy turns out to be an unsuccessful because of insufficiency in attraction system, conflict of interests between government and institutions, inequity against domestic talents, and complaints from invited talents themselves (Gu, Park & Ahn, 2012).

This research will delve into China's Recruitment Program of Global Experts focusing on national government policy in detail and to analyze the China's Recruitment Program of Global Experts designed for attracting global experts. Based on the findings of this, it will make policy suggestions for establishing and promoting other country's overseas-talents-attraction policy.

China's higher education overseas-talents-attraction policy

China has regarded enhancement of national competitiveness as core element and promoted policies to attract overseas talents in case of insufficiency since the reform policy in 1978. It's in the 1980s that China started to emphasize on fostering talents according to the international standards. The field of education was burnt to the ground during the Cultural Revolution, which had been sustained for 10 years since 1966. As a result, 'slip event' of domestic talents became noticeable around 1980. To solve such a 'slip event' of domestic experts, Deng Xiaoping presented his idea of guidance, "Respect Knowledge! Respect Experts!". The Chinese government established a policy goal so that domestic talents could participate in its national development project according to this idea of guidance and every government department promoted various international talents-attraction policies accordingly. Looking back, it can be seen that overseas talents-attraction policies began to be enacted when China's economic development began to recover in 1980s (COD, 2008).

In the first place, Chinese Academy of Science was the representative agency that promoted overseas talents-attraction projects in the 1980s. At this time, the goal of the Chinese Academy of Science's talents-attraction policy was largely to make up for the 'slip event' of talents for the past 10 years. Particularly in this period, policies and measures to induce the young generation of scholars was a priority. After more than 10 years of efforts until early in the 1990s, young researchers in Chinese Academy of Science grew rapidly and their level of quality improved. However, the overall research capacity wasn't improved because the number of young researchers increased, whereas that of leading scholars who could lead them was lacking. Accordingly, an ability to foster the leaders who could lead the Chinese Academy of Science emerged as an important challenge and under such a background, 'Hundred People Plan' was enacted in the 1990s (China Education Daily, 2009).

In 1994, China expanded its research funds despite poor financial status and supported the scholars selected through 'Hundred People Plan'. In the same year, National Natural Science Foundation (NNSF) established 'NNSF's Outstanding Youth Plan'. Unlike the background of 'Hundred People Plan', this plan was one of the overseas-talents-attraction policies targeting young international students who would hesitate to determine whether they would remain in foreign countries after acquiring a degree or return to China after a degree. Such young scholars are talents who strived to concentrate on their studies even in their difficult situations and overcame various difficulties under poor environment ever after the Cultural Revolution. 'NNSF's Outstanding Youth Plan' was a meaningful plan in that the State Council established a plan to induce them to return to China (China Education Daily, 2009).

On the one hand, the Chinese government's policy was that they encouraged their students, who were already employed overseas or still while at school, to study overseas and then return to China, but it was optional. Based on such overseas-talents-attraction policy, the Chinese Ministry of Education established 'Parental Affection (Chunwi) Plan' in 1996 (Ju & Yang, 2010). To encourage international students who studied abroad to return to China, the Chinese Ministry of Education and Rijyacheong, a businessman in Hong Kong together established 'JangGang Scholar Encouragement Plan' in August 1998 (Jiao, 2006). They also established a network with overseas scientific inquirers and research organizations and established an efficient cooperative research system, and to improve the activeness of scholars who hoped to improve the most advanced scientific technology creatively, China Association for Science and 35 international scientific institutions jointly conducted 'National Action Plan on International Intellectual Resources' in February 2004.

The Department of Human Resources Social Security established 'Deficit Plan' in 2009. This plan is a project designed to complement the Returned-International-Students' Volunteer Work conducted by the Department of Human Resources since 1988. In 2010, the State Oceanic Administration published 'Marine Human Resources Plan', which stressed importance to the development of talents in marine field in accordance with this guideline "Develop Professionals Necessary for Economic and Social Development" based on "Guideline for National Long-term Talents Development (2010-2020)" proclaimed by the central authorities and the State Council (The Central Government of The People's Republic of China, 2011). The marine field is the most important area for economic and social development in China and an ability to build a marine super power is one of the core goals of China for the 21st century. To this end, they promoted a systematic marine-talents training project at a national level. Above all, in order to convert human resources into productive capacity, they tried various efforts, which included overseas-talents-attraction policy for fostering international talents.

Most of China's current overseas-talents-attraction policies are led by the Ministry of Education, the Ministry of Human Resources Social Security, and the State Oceanic Administration. In addition to these government departments, China's representative projects are led by the Chinese Academy of Science, the National Natural Science Foundation, and the China Association for Science & Technology. Especially, the 'Recruitment Program of Global Experts' implemented in 2008 is a strategic talents-attraction plan at a national level and controlled by the Chinese Communist Party Central Committee by establishing a 'Talents Training Cooperative Office'.

China's current overseas-talents-attraction policy mostly consists of short-term support programs despite the presence of domestic and overseas talents attraction policies. This indicates that the fundamental purpose of China's overseas experts-attraction policy is a transfer of such talents' technology and intellectual assets into China rather than just achieving an outcome of bringing 'people' into China. Most of talents-attraction plans target international students who are interested in returning home or scholars who have their academic position overseas. Such high-quality talents have already shown their achievements in the field of research or their potential to expect good results.

Furthermore, as the focus of various talents-attraction plans varies, the characteristics and outcomes of such talents-attraction plans appear different, and both field of and content of application are subject to the purpose. ‘Parental Affection Plan Project’, for example, is adjusting its field of research, direction of major field, and characteristics of program for talents depending on their need every year. ‘JangKang Scholars Encouragement Plan’ is combined with ‘Project 211’ and its main purpose is to foster mentors for young university schoolteachers by attracting talents with excellent capacity. ‘Marine Talents Plan’ is focusing on attracting talents from various fields such as science and engineering, agriculture, medicine, food safety, environment, biological pharmaceuticals, photoelectrical information technology, digital technology, social welfare, etc.

Major achievements of such talents-attraction programs cannot be ignored. The outcome of ‘Parental Affection Plan Project’ lies in providing support to the development of Chinese western regions by conducting ‘Western Region Construction Project for Chinese Students who Studied in France’ with the Gansusheng Government of China and the Chinese Embassy in France. Through ‘JangKang Encouragement Plan’ (Jiao, 2006), 799 scholars were employed as professors in 97 Chinese universities. In addition, 24 ‘JangKang Scholars’ specially invited professors were appointed as director of Chinese Academy of Science and director of Chinese Project Research Center and 57 specially invited JangKang scholars were appointed as senior research scientist for ‘973’ Project. ‘Marine Talents Plan’ became a foundation for constructing seven bases such as China’s Xinjiang Base-International Center for Sustainable Development Research in the Dry and Semiarid Regions, Fuxin Base, ChangChun Base-ChangChun Overseas Scholars Business Startup Complex, Capital Base, Heopeoi Base, Changzhou Base, and Fujian Base. Through ‘Deficit Plan’, over 10,000 technical cooperation and exchange programs were achieved until 2010 and became a great help for regional development and every field. In this process, 7,000 scholars participated in regional development programs and achieved more than 2,000 cooperative consultations (CPGPC, 2010).

Despite such visible achievements, there are not-a-few problems in that talents-attraction policy caused exhausting competition between regional governments, that they did not achieve good results in attracting the world’s greatest scholars due to limitations in research condition and market environment and they rather selected secondary talents, that they over-exaggerated their talents-attraction outcomes, that some international talents who returned to China only benefited from the overseas-talents-attraction programs and came and went from foreign countries too frequently, that many overseas talents worked for domestic universities although they already had an official job overseas or were in a situation that they could not inform overseas office about their employment in China, and that they were reluctant to sign although they acquired an academic achievement through collaborative research project in China.

China’s Recruitment Program of Global Experts for attracting overseas talents

The Recruitment Program of Global Experts, also known as Thousand People Plan is an overseas-talents-attraction project at a national level to attract the world-

class scholars and more than one thousand professors by investing a massive budget for the next 5-10 years. The purpose is to achieve economic growth and sophisticated industrialization in China. In other words, it is a program to attract scientists and key important talents required for promoting key technology development, advanced technology and industry development, and emerging academic development and support them to engage in China's technical innovation and business startup programs (Ryu, Um & Kwon, 2011). The number of talents attracted through the Recruitment Program of Global Experts is more than 1,500 in 2012.

The Recruitment Program of Global Experts is different from the existing overseas-talents-attraction plans in terms of scope of support and technical requirement. If failed in the individual screening for the Recruitment Program of Global Talents (Thousand People Plan), they are allowed to apply for Hundred People Plan (Recruitment Program of One Hundred People) again. In case of Hundred People Plan, the Chinese Academy of Science led it, whereas Thousand People Plan is a comprehensive and massive project in which most of relevant departments participated under the Central Government Communist Party. Furthermore, the existing policy was based on simple innovation-type talents attraction, whereas Thousand People Plan is an expanded innovation-type centering on the sophisticated industrialization and industrial leader including experts specialized in business startup and financing. Therefore, it is necessary to understand and analyze the contents, current status, and outcomes of Thousand People Plan in order to predict the flow of changing China's Open Innovation and future growth.

The purpose of the Recruitment Program of Global Experts is to bring overseas excellent talents into Concentrated National Innovation Projects, Concentrated Departments, Concentrated Laboratories, Central Enterprise, and State-Owned Commercial Financial Institutions and utilize them for China's economic growth and sophisticated industrialization. It's a program to attract leading scientists and talents who will become a driving force to seek for core technical development, high-tech industrial development, and emerging academic development and help them to strive for China's technical innovation and business startup.

The fundamental principle of the Recruitment Program of Global Experts is, first, to concentrate on expanding excellent talents attraction depending on the demands of national economy and social development based on the concentrated expansion in principle and promote the world-class excellent innovative talents and groups attraction plans. Second, it is to exert the role of overseas excellent talents as fully as possible by establishing an innovative mechanism and project operation mechanism and creating excellent environments based on the expanded role in principle. Third, it is to introduce special policies according to the excellent talents attraction and utilization programs based on special task and special treatment in principle and to offer the best customized Demand-On benefits. Fourth, it is to establish an organic cooperative mechanism between sub-task groups, lead agencies, and recruiting agents based on efficient operation in principle.

Although there are many overseas-talents-attraction programs at the central government and local government level, the Recruitment Program of Global Experts is the strongest overseas-experts-attraction program that is promoted by the Chinese

Communist Party. Indeed, the government organization led by the Recruitment Program of Global Experts is a kind of task force specialized in attracting overseas talents under the government, which is called as 'Overseas Talents Attraction Sub-Task Group' and thus led by the Central Organization of the Communist Party and the Government's Manpower Resources Social Security Department and participated by the Government's relevant departments.. And the overseas-talents-attraction-specialized service bureau under the experts division of the Central Organization of the Communist Party is engaged in ordinary works related to the Recruitment Program of Global Experts. The purpose of China's taking the lead in attracting high-quality experts is to develop China's status a step further in the international division-of-labor structure based on the leverage of creative intellectual labor (Southern Daily, 2012).

The general requirements for applying for the Recruitment Program of Global Experts are that you ought to have a doctor's degree overseas; you should not exceed 55 years old in principle; and your period of work in China every year should exceed 6 months. And you should meet one of the following conditions. First, you should be an overseas innovation-type expert who has a career of having worked as an expert equivalent to the position of professor in overseas famous universities or research agencies. Second, you are an overseas talent who has a career of having worked for more than 3 years in the field of advanced technical profession and administrative management at internationally famous enterprises and financial institutions. Third, you are a business startup-type expert who holds a unique intellectual property or core technology and has an experience with starting up a business independently overseas and is well aware of the related industrial field and international norms. Fourth, it's an excellent innovative business startup-type expert who is urgently required at a national level.

Implications and conclusions

In China, the number of students studying overseas has been increasing amid rapid economic development, whereas the number of those who studied overseas and then returned home has been decreasing. This became a national issue. Of the total 1,620,000 Chinese people who studied overseas over the 31-year period (1978-2009), only around 500,000 returned home. In particular, the fact that about 240,000 returned home among 920,000 individuals between 2002 and 2008 highlights the national demand for, and necessity of the Recruitment Program of Global Experts. In 2008, the Recruitment Program of Global Experts implemented and employed world-class scholars, entrepreneurs, and professional technicians. It also input them into national concentrated tasks, higher educational institutions and research centers, state-owned firms and banks as well as high-tech industrial complexes. At the same time, as their resettlement funds and housing, medicine, education and insurance provisions got better and their social improved, systematic outcomes began to appear more favorable.

In 2011, the number of students who studied abroad and returned home was around 147,000, which was a 45% increase compared to the previous year. As of November 2011 the Recruitment Program of Global Experts attracted 1,143 excellent overseas experts, among whom 880 were innovation-type experts (77%) and 263 were business startup-type experts (23%). These people are contributing

significantly to the development of the high-tech and finance industry which had been the relatively weak segments of the Chinese economy.

However, the Recruitment Program of Global Experts promoted so far has many side effects despite the visible outcomes. First, in the process of conducting the Recruitment Program of Global Experts, they are too leaned toward particular experts. So it's pointed out that they are inefficient in managing the rest. Also they have been criticized for being too passive in discovering low-profile experts because they only focus on known figures in the media. Another problem is that such quantitative selections and governmental plans cannot verify the true credibility and faithfulness of the experts.

There is a mal-adaptation phenomenon for invited experts because their original backgrounds are quite different from China's unique research and living environment. Still more, overseas experts' western and liberal style can be a potential threatening factor politically. At the same time, accompanied family's employment, family housing and medical service issues are among the potential problems despite various conveniences provided by the governmental.

Another problem is the issue of inequality between domestic scholars and returned overseas experts. The Recruitment Program of Global Experts aims to select overseas experts and provide very lucrative incentives, but may face two problems. First, domestic scholars in China might lose some opportunities for research. As there are limited budgets, domestic researchers' opportunities for research may be diminished if such opportunities are given to overseas experts. Although domestic scholars in China have the same capacity compared to the overseas experts, their willingness to conduct quality research could be reduced because the same treatment available to overseas experts is not given to them. This might raise problems for the long-term viability of the Program.

We also should investigate success and failure factors in attracting overseas experts and prepare for policy measures accordingly. The challenges are as follows:

Firstly, in order to address the potential challenges, it is necessary to take into consideration any relevant laws or systems which would affect this project. Two of the key factors in determining the ultimate success or failure of this are program management/supervision and accessibility. Efficient management or supervision can provide measures for relieving unnecessary regulations.

A second challenge may be the ability to create enough empathy towards China to make people want to come and to gain and maintain overseas' experts trust in the likelihood of success. Therefore it will be essential to publicize reports of prior successful cases. If people cannot trust in such a project, there will be a limitation in the end.

Thirdly, each task and detailed sub-task should be approached strategically by setting a clear goal for attracting overseas experts. If a goal is not clear, corporate strategy cannot be comprehensive and thus it's difficult to put various tasks into action. In particular, domestic and international investigation of demands, publicity strategy for attraction, organization and utilization of expert groups, and improvement of operating system of committee are important challenges to approach in a strategic way by setting a clear goal.

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Prof. Dr. Hanna Kim, Tsinghua University, China, hannakim@mail.tsinghua.edu.cn

Gordana Stankovska, Slagana Angelkoska, Fadbi Osmani & Svetlana Pandiloska Grncarovska

Job Motivation and Job Satisfaction among Academic Staff in Higher Education

Abstract

Education is the most important organization of a nation; it plays a significant role in the development of any country. Universities create and cultivate knowledge for the sake of building a modern world. The academic staff is the key resource within higher education institutions. A positive and healthy university structure results in increased academic staff's job satisfaction and better job motivation. According to this, the main purpose of this research was to investigate the possible relationship between job motivation and job satisfaction among academic staff. The Job Satisfaction Survey (JSS) and Job Motivation Questionnaire (JMQR) were administered to a sample of 100 (50 males and 50 females) university employees. The results indicated that the academic staff was highly motivated with their job. At the same time the results showed that academicians were more satisfied with their salary, co-workers, promotion, operating procedures and supervision, but dissatisfied with fringe benefits, contingent rewards, nature of work and communication. This research offers practical suggestions to the educational institutions and human resource managers on how to pay, promote, retain and maintain equity in the universities.

Keywords: job motivation, job satisfaction, public university, academic staff, management

Introduction

Academic staff plays a vital role in determining the success of the vision and mission of a university. This is supported by Bentley et al. (2013) who agree that a high quality academic staff is the source of successful education system. Therefore, it is important to pay attention to job satisfaction of the teaching staff. A positive and healthy university structure results in increased academic staff's job set. A healthy university environment will not only increase the job satisfaction of academic staff, but it will at the same time improve the learning environment and increase the productivity of the university.

Machado-Taylor et al. (2010) found that job satisfaction and motivation among academic staff play an important role in contributing to positive outcomes in the quality of the institutions and the students' learning. This is true, because the success of a university relies on the academic workforce. Khalid et al. (2012) believe that universities are known as the highest source of knowledge where the future workforce is trained to become experts in various fields.

The performance of academic staff as teachers and researchers determines much of the quality of the students' satisfaction and has an impact on students' learning and thus contributes to the higher education institutions of society. Thus, the satisfaction and motivation of the academic staff assume importance.

Definition of job satisfaction

Job satisfaction is a complex phenomenon, because it is related to various causal factors such as personal, social, cultural, environmental and financial factors. The nature of job satisfaction is an important factor in deciding the level of job satisfaction of employees.

Job satisfaction is an individual's emotional response to his or her current job condition. It is a pleasurable emotional state, resulting from the appraisal of one's job; an effective reaction from one's jobs as an attitude towards one's job. Job satisfaction has been defined as a perceived relationship between what one wants from his/her job and what one perceives it as offering. Job satisfaction is the collection of feelings and beliefs that employees have about their jobs. In fact employee's general attitude towards his or her job could equally be regarded as job satisfaction.

Job satisfaction is multidimensional with both intrinsic and extrinsic qualities. The former include ability, achievement, advancement, compensation, co-workers, creativity, independence, moral values, social service, social status and working conditions. The latter involve authority, policies and practices, recognition, responsibility, security and variety (Wang & Lee, 2009).

The researchers have written a set of predictors for job satisfaction, which include pay, work, promotion, supervision, environment and co-workers (Sequoia, 2000). A majority of researchers' measure job satisfaction on the basis of employees or workers are: attitude to the job, relation with co-workers, supervision, company policy and support, promotion and pay (Signage & Short, 2006).

Role of job satisfaction among academic staff

Universities are considered the highest source of knowledge and awareness production institutions which train the subject in different fields of life. Academic staff is comprised of staff members with the primary assignment to instruct research or participate in public server. They are key resources to the success of any educational programmers. So satisfaction among academics is essential for the success of high educational institutions. It shall be a priority for every employer to keep employees satisfied in their careers. Bentley et al. (2013) indicate that a healthy climate at university increases not only the job satisfaction among academicians, but it also increases the academicians' performance. Nordic (2009) added that a healthy atmosphere in a faculty can be affected by many factors such as healthy working conditions, relationships with colleagues, support in research and teaching, appropriate salary, promotion, opportunities, etc.

Azeri (2011) explained that job satisfaction is a condition of positive and negative feelings of academic staff toward their job and show different reactions at work environment. Also, job satisfaction has been defined as a main factor among university employees that causes various organizational behaviors and changes the staff mood at work (Eslami & Gharakhani, 2012). In fact, the job satisfaction can be a combination of facets where each of them can cause satisfaction of low or high levels. These factors included organization vision, management system, motivation, pay, benefits and co-workers' behavior. The study of Lufthansa (2005) suggests that

pay, promotion, work, supervision and fellow workers are the main determinants of the job satisfaction.

Job satisfaction as a vital factor should be determined in each organization and the existence of this positive feeling is very different among academic staff. However, providing the real way for improving and monitoring this factor, as one of the main organizational policies, should be considered by universities.

Definition of job motivation

Motivation, a Latin word “mover” means to move. Motivation is the inner drive that pushes individuals to act or perform. Specific theories may purpose varying set of factors influencing motivation (Harder, 2008), but many researchers agree that motivation is the psychological process that leads to behavior and this process cannot be directly measured or observed (Locke & Lethem, 2004). Colquitt (2009) explained that, “motivation is critical consideration, because job performance is function of two factors: motivation and ability”.

Pinter (1998) defines job motivation as the set of internal and external forces that initiate job-related behavior and determine its form, direction, intensity and duration. In other words, job motivation can be explained as the process of stimulating an individual or a group of people to activities aimed at achieving the goals of the organizations. It is an integral component of employee engagement.

Role of job motivation on job satisfaction

Tan & Wahid (2011) maintain the motivation’s aim with regard to job satisfaction, which is to make framework available to understand factors that affect job satisfaction, as well as the manner in which those aspects affect individuals’ quality of work life. The implied role of job satisfaction has been represented by many job motivation theories that have additionally, attempted to clarify both job satisfaction and its influence.

The level of individual’s job satisfaction is affected by intrinsic and extrinsic motivating factors, the quality of supervision, social relationships within the working group, and the degree to which the individual succeeds or fails in their work (Daft, 2005). In the case with academic staff both intrinsic and extrinsic factors affect their satisfaction. Further studies suggest that teachers put more emphasis on intrinsic satisfaction (Place, 1997), but other studies suggest a mix findings of intrinsic and extrinsic satisfiers are the best predictors of teachers’ job satisfaction (Herzberg, 1987; Bentley, 2013). Their intrinsic satisfaction comes from teaching activities and responsibility, while, extrinsic factors have been associated with academic staff’s satisfaction, including salary, perceived support from supervisors and co-workers, and availability of university resource, among others. Researchers concluded that motivated and satisfied academicians are more likely to show up for work, have higher levels of performance and will stay with their education organization (Daft, 2005). At the same time they show better level of motivation and better work ability.

According to these findings, the main purpose of this study was to investigate the level of job motivation and job satisfaction among academic staff in the Republic of Macedonia.

Research methods

To investigate the impact of motivation, pay, promotion, supervision, fringe benefits, contingent rewards, operating procedures, co-workers, nature of work and communication on job satisfaction of academicians in the Republic of Macedonia, the following research methodology was employed in this paper.

Sample

The sample for this study comprised 100 full-time academic staff including assistants, assistant professors, associate professors and full professors. All employees are aged between 28 to 60 years. The mean age of the employees was calculated as 42.50 (SD=7.24). Among the participants, 50% (N=50) were female and 50% (N=50) were male. The mean number of years teaching experience of participants was 8.6 years. In academic rank category 30% (N=30) were assistants, 30% (N=30) assistant professors, 30% (N=30) associate professors and 10% (N=10) full professors. The data were collected from the public university in Skopje. The research was conducted from September to November 2016.

Questionnaire

Job satisfaction for measuring is applied scale for job satisfaction assessment (Job Satisfaction Survey-JSS) by Paul Specter (Specter, 1985). The Job Satisfaction Survey is a 36 item, nine facet scales to assess employees' attitudes about the job and aspects of the job. The nine facets are: Pay, Promotion, Supervision, Benefits, Contingent Rewards (performance based rewards), Operating Procedures (required rules and procedures), Nature of Work, Co-workers and Communication. It is a six-point linker type scale (disagree very much, disagree moderately, disagree slightly, agree slightly, agree moderately, agree very much). Items are written in both directions, so about half must be reverse scored. The total score ranges from 36 to 216, with high scores indicating greater level of job satisfaction. In this study Cronbach's alpha coefficient for internal consistence was 0.86.

For the assessment of job motivation we used Job Motivation Questionnaire (JMQ) with 20 items from the scale which are linker type. The total score ranges from 20 to 100, with high scores indicating greater level of job motivation. Internal consistency of the scale expressed through Cronbach's alpha coefficient $\alpha=0.76$.

Data procedure and data analysis

The questionnaire sets were distributed to the participants and collected in their offices on a self-reported basis. All participants were asked to indicate their age, gender and length of work experience. They were also requested to read the directives stated on the questionnaire carefully before endorsing their response. All the responses were completely anonymous.

For hypothesis testing statistical package SPSS 20.0 for Windows package program was applied. Descriptive statistics were used to analyze the data. Pearson correlation and one way Analysis of Variance (ANOVA) were done to find the p value and statistical differences among groups. In this study, the significance levels were accepted as .01 or .05.

Results

The results indicated that the academic staff was motivated and satisfied with their professional work. In fact there was a negative relationship between job motivation and job satisfaction among assistants ($r=.228$, $p>.01$); but positive relationship between job motivation and job satisfaction among assistant professors ($r=.018$, $p<.05$), associate professors ($r=.544$, $p<.01$) and full professors ($r=.094$, $p<.05$).

Also in this study we investigated the level of staff satisfaction on their job. Analysis revealed the mean scores for each of the nine items/determinants of academic staff job satisfaction. On a six-point scale, the mean score for pay is 13.24($SD=0.84$), promotion is 12.23($SD=0.64$), supervision is 14.45($SD=0.85$), benefits is 8.45($SD=0.64$), contingent rewards is 8.56($SD=0.54$), operating procedures is 12.85($SD=0.81$), co-workers is 14.22($SD=0.92$), nature of work is 10.22($SD=0.82$) and communication is 8.65($SD=0.48$). The results indicated that academic staff was highly satisfied on each of the five satisfaction factors-pay, promotion, operating procedures, supervision and relationship with co-workers. However, the results showed that staff was not satisfied on the remaining four job satisfaction factor-benefits, contingent rewards, nature of work and communication.

At the same time the results indicated that assistants were very satisfied with the pay ($r=.459$, $p<.05$), promotion ($r=.371$, $p<.05$) and co-workers ($r=.365$, $p<.05$); assistant professors with pay ($r=.432$, $p<.01$), promotion ($r=.375$, $p<.05$) and supervision ($r=.362$, $p<.01$), while associate professors and full professors with supervision ($r=.182$, $p<.01$), operating procedures ($r=.112$, $p<.05$) and nature of work ($r=.423$, $p<.05$).

The results showed that there was not a significant mean difference in the levels of job motivation and job satisfaction experienced by male and female employees. We found that there was a positive correlation between pay and female employees ($F_{44, 1}=3.798$, $sig=.058$, $p<.05$). At the same time there was positive relationship between supervision and male employees ($F_{44, 1}=.809$, $sig=0.62$, $p<.05$).

Discussion

The study investigated the level of staff motivation in an academic setting and found that staff was very well motivated, except for the assistants. Our finding is very similar with earlier findings. Akfopure et al. (2006), for example, found that employees of agribusiness were highly motivated on their jobs. The consistencies in the result suggest that staff motivation in public organizations is prioritized by the employees leading to mutual gains to both parties: job satisfaction to employees and high productivity to organization.

The results of this study indicated that job motivation has direct effect to the job satisfaction. The job motivation can affect job satisfaction of academic staff either directly or indirectly. Therefore, based on these results it can be argued that one way to improve job satisfaction is to increase the motivation at work. The study found that job motivation has positive direct effect on job satisfaction of academic staff.

From the study we could also see that pay, promotion, supervision, operating procedures and relationships with fellow workers are the main determinants of the job satisfaction. It's similar with the other research studies. For example, at the study

by Saga, Talon & Tekogul (2011) amongst postdoctoral researchers it is found that pay and promotion associate with job satisfaction. A number of authors are in opinion that having friendly and supportive colleagues can contribute to increased job satisfaction (Embay & Bagger, 2013; Vlosky & Aguilar, 2009). Bassett (1994) maintains that supervisions bringing the humanistic part to the job contribute towards increasing the employee's level of job satisfaction.

There are different factors that influence the job satisfaction at universities and it is very noticeable that the university managers tend to control those factors. Job satisfaction is one of the main factors that relates to staff's performance and increases the level of their activities and attendance in the workplace. The existence of satisfaction among the academic staff leads to long term careers at the same university and to increased productivity in the workplace.

Conclusion

Many studies tend to focus on job motivation and job satisfaction of academic staff. This is important because many human resources, both in and outside the university environment, know that when employees are happy with their life and work, they tend to be more motivated and productive (Berta, 2005).

Academic staff satisfaction is highly recognized through the performance of students at university. When an organization manages to increase employees' job satisfaction, it does not only benefit the employees, but also the organization as a whole. Job satisfaction leads to a work productive workforce and more organizational success. Those who enjoy their work are believed to have a high quality of work life, while those who are unhappy are those whose needs are otherwise not fulfilled and who are believed to have low quality of life. It is very important, because the academicians have many various responsibilities. They are expected to educate students, communicate and collaborate with them, develop their own skills and knowledge. Many times they meet problematic students of various ages or difficult. These interactions require communication, problem solving and conflict managing skills. So it is obvious that academic staff differ from typical employees in various ways.

The principle role of the universities is recognizing the needs and the desires of academic staff based on various working situations and meeting those needs according to the organization's policies. In reality, the universities should have adequate consciousness and knowledge for preparing and developing appropriate atmosphere among academic staff and realizing their tendencies and needs from workplace. All of these education organizations need to provide appropriate facilities for their staff.

The findings reported in this study make a valuable contribution to the awareness of understanding the concept of job satisfaction and the effect of the motivation on job satisfaction. However, additional research is needed for further investigation of the potential relationship and effects that these variables and other variables have on job satisfaction. That means that different cultures with their own values, religion, and socioeconomic status may have an impact on research findings. At the same time the study should be replicated using a much longer sample that would be selected more broadly from both public and private universities in the Republic of Macedonia.

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Prof. Dr. Gordana Stankovska, State University of Tetovo, Republic of Macedonia,
gorstankovska@gmail.com

Slagana Angelkoska, PhD Candidate, Center for Social Work, Gostivar, Republic of Macedonia

Prof. Dr. Fadbi Osmani, State University of Tetovo, Republic of Macedonia

Assist. Prof. Dr. Svetlana Pandiloska Grncarovska, State University of Tetovo, Republic of Macedonia

Octaviano García Robelo, Jorge Hernández Marquez & Ileana Casasola Pérez

Comparative Analysis of English Language Student's School Paths at a Mexico University

Abstract

Seven factors related to academic paths of students of the Bachelor of English Language of a public university in Mexico are investigated. With a non-experimental descriptive design, a Likert scale was applied to evaluate the college students' perception of these factors. A comparative analysis between three types of school paths was performed. It was found that students with irregular school paths show higher academic difficulties by internal and external problems, such as difficulties in their study habits, problems with their teachers, personal problems and economic problems. Most students reported having difficulties with management of stress, among other important results. This research provides useful information to improve teaching practices, curriculum and mentoring. Psychological and external problems were identified as factors that can be integrated into programs of prevention or intervention, to help improve the education of students and increase terminal efficiency in this university.

Keywords: academic paths, higher education, English language

Introduction

In Mexico, universities face the problem of low completion rate of students related to the laggard, failure, poor performance and abandonment of their studies (ANUIES, 2001; Garcia, 2014). This paper presents a research job exploring the students' perception of the Bachelor's degree program of English Language Teaching at the Autonomous University of the State of Hidalgo regarding a number of factors affecting their academic path. The academic path is defined as the history of each student since the admission to graduation from college, considering that there are many factors influencing either the successful completion of their studies or even the failure (Ponce de León, 2003). In Mexico, according to the analysis of a series of research jobs within the study of languages, English is the language which is most studied, followed by French language. The main reasons are that, in addition to the establishment of educational government policies for English teaching at schools, English is the foreign language most taught in our country. Besides, Mexico is located between two countries where English is spoken (southern with Belize and the north with United States). Also, the current dominance of English as the main language in trade, political and cultural relations (Ramirez-Romero et al., 2013).

Conducting research on academic paths is important because data and information are collected which are useful for decision-making to help students to carry out their professional studies in college; plus, it is a responsibility of each university (Díaz-Barriga, 2009). Factors which were analyzed were: teacher's

perceptions acquired knowledge and skills during their training, perceptions of plans and curricula, academic difficulties due to external factors, academic difficulties due to internal factors, job expectation and mentoring. These factors are evaluated by applying the test that was applied to data collection.

Methodology

A quantitative research methodology, including a descriptive non-experimental design was used to observe the phenomenon within its natural context and then analyze it, without manipulating variables. Data were recollected at a specific moment (Mertens, 2010; Hernández, Fernández & Baptista, 2010).

Sample

The sample consisted of 8 men and 17 women, with a total of 25 students in their second semester of the Bachelor's Degree in English Language Teaching at the Autonomous University of the State of Hidalgo, cohort 2014. The university is a public school.

In order to perform the analysis and follow the academic paths of students, it was considered necessary to choose the last cohort; therefore, it was decided that the sample should be purposive and include the total number of students of the recent cohort (Hernández et al., 2010) of the Academic Programme in English Language Education.

Assessment tool

The data collection tool employed for this study is questionnaire, the first section of which evaluates general data; the second section evaluates seven factors, including a series of items as statements with Likert-type answers. The instrument was previously tested and validated; a Cronbach's alpha of .90 was obtained. For the purpose of this paper, only results from the second section are presented.

Data analysis

For data analysis, students were organized according to their academic paths. Three were obtained: students with Excellent Paths, who did not fail any subjects and have a Grade Point Average (GPA) between nine and ten; students with Regular Paths who failed subjects and have a GPA between 8 and 8.9, and students with Irregular Paths having a GPA below 8 and have one or more failed subjects.

Then, the mean response of the three types of paths, i.e., of the three groups was compared. A descriptive statistics analysis was made only considering the average total response for each factor and for each group. Then, the response of each reagent of the factors analyzed was analyzed, considering that the answers have options 1 to 5. The response options were as follows:

- 1 = Strongly disagree
- 2 = Disagree
- 3 = Neutral
- 4 = Agree
- 5 = Totally agree

Results analysis per factor

It was generally necessary, for the analysis and interpretation for each of the seven factors and their respective items, to consider the type of academic path of the students and their mean responses, which can gradually go from 1, which means Strongly disagree, to 5, which means Totally agree. The types of paths analyzed were: Excellent Path (1), Regular Path (2), and Irregular Path (3).

Thus, in these results, according to the descriptive analysis, an average response of 3.9 was found among Excellent Path students (N = 14), an average response of 3.5 for Regular Path students (N = 8) and an average response of 3.5, too, among Irregular Path students (N = 3). In general, these results allow inferring a regular perception among students regarding the teacher's role, considering that most responses among students are located between level 3, Neutral, and level 4, Agree.

On the contrary, there was a very clear difference in the item evaluating the students' perception about whether "the teacher encourages an active participation": Irregular Path students seem to agree less regarding this role of the teacher, less agree on the role of the teacher, as compared to the perception of Excellent Path students.

Meanwhile, among the results obtained regarding the "Perception of knowledge and skills" factor which was acquired by students during their professional training, an average response was found among Excellent and Regular Path students of 4.4, an average 4.1 for Regular Paths and an average of 4.1 for Irregular Paths. These results show that students seem to agree regarding the fact that knowledge and skills they acquire during their training are useful and important, slightly better perception of students with Excellent Paths.

As for the "Perception of the Bachelor's degree program during training" factor, a favorable response was also found in which the average response for Excellent and Regular Path students was 4, the average response for Regular Path students was 3.7 and the average response for Irregular Path students was also 3.7. These responses indicate that they maintain a positive perception regarding the program.

An analysis per reactive stresses that students in the three paths agreed that "the activities planned in the program allowed them to increase their abilities to work together", "contents are updated", "the educational program level is excellent", "subjects are relevant to their training".

As for the "Perception of academic difficulties due to external factors" factor, an average response of 2.7 was found for students with excellent school paths (N = 19), an average response of 2.6 was found for students of regular school paths (N = 4), and an average response of 3.2 was found for students with irregular paths (N = 2). These results indicate that students with an Irregular Path tend to show more academic difficulties, due to external factors.

Specifically, it is interesting that Irregular Path students fully agree in that "having learning difficulties because they are easily distracted". These students tend to agree that they have "school problems because are not satisfied with complex contents", "administrative procedures", "the career does not meet their expectations", "economic problems" and "difficulties with their teachers".

Regarding the results for the "Perception of academic difficulties due to internal factors" factor, an average response of 2.4 was found for Excellent Path students (N = 19), of 2.9 for Regular Path (N = 4) and of 3.3 for Irregular Path (N = 2).

Generally, those who reported having more school difficulties due to internal factors have Regular and Irregular Paths.

Specifically, students with Irregular Paths perceive having school difficulties, because they have “problems in their study habits” due to “personal problems”, “a lack of interest in the contents” and a “lack of dedication to their studies”. Students with Regular Paths have a smaller ratio of these problems. The three types of students show difficulties due to the “lack of stress management”.

Regarding the results for the “Vocational expectations of students” factor, a favorable mean was generally found, and the average response of students with an Excellent Path was 4, it was 3.7 for students with a Regular Path, and also of 3.7 for Irregular Path students. This average response seems to show that they still agree and have positive vocational expectations.

In the analysis per item being favorable stresses the fact that students with the three paths almost fully agree that “the career being studied will allow them to work as teachers”, and the response of Excellent Path students was slightly higher. Similarly, they seem to agree regarding the fact that “completing their studies will give them the opportunity to work abroad”.

As for the item valuating “whether they would change their career”, Excellent Path students disagree, Regular Path students have a neutral response and Irregular Path students said they agree to study another career.

As for the “Perception of mentoring” factor, an average response was found for Excellent Path students of 3.1, of 2.7 for Regular Path students and 2.8 for Irregular path students. Since the response was at an intermediate level, their response was neutral; however, both the Regular Path and the Irregular Path responses were slightly lower, and it was slightly better for Excellent Path students.

In the analysis made per item students with the three paths agreed that “the guardian assists with respect and ethics during counseling and supervision”. On the other hand, they disagree regarding whether “the tutor assigns activities not related to personal development”. Another reagent in which their disagreement is similar is related to the fact that the “tutor facilitates those processes for the obtainment of the grant”.

Conclusions

In conclusion, results show that students from the three school paths agree, since their responses were near level 4, considering that their teachers properly exercise their teaching activities. However, it is necessary that teachers continue to be updated, to self-evaluate their educational practices, to improve their teaching methods and strategies and adapt their students' learning to real contexts (Díaz-Barriga, 2010; Sola & Moreno, 2005).

As for two factors: perception of the theoretical and practical knowledge acquired during training, and the perception of academic plans and programs, students with the three types of paths showed a response between levels 3 and 4, so these factors are acceptable. Recent authors (Lavín & Farías, 2003) do not separate plans and programs from the constant changes faced by higher education; they say that one of the objectives of plans and programs is to ensure the student's general training by means of quality and innovation contents and the inclusion of supports such as mentoring, new learning models, evaluation, accreditation and certification.

So, it is important to have continuous evaluation, updating and innovation of curricular plans and programs regarding the knowledge acquired by the students who wish to obtain the Bachelor's Degree in English Language and consider the needs in the labor market.

Students with Irregular Paths reported having academic difficulties due to economic problems. These data are similar to those reported by Rodríguez in Chile (2015), where English language students with limited economic resources are those with the greatest difficulties, so it is suggested to look for alternatives to support the students' economic situation; for example, promoting and increasing the number of scholarships for students with greater financial needs.

Finally, the perception of mentoring in general. The response offered by students of the three paths was located at about level 3, thus suggesting the need to improve the tutorials offered to these students with different needs (García, 2014).

Globally, according to the perceptions of students of the three types of paths, they reported different needs to improve the quality of their learning. So school paths should continue to be analyzed, so as to find out which factors are relevant and which remedial intervention and prevention programs might be generated to help students develop professionally, successfully complete their studies and improve the terminal efficiency of their programs and university (García & Mendoza, 2015).

The findings for English Language student's paths in universities from Mexico provide useful information to improve the teaching and learning processes of English language. Students need support to improve their learning strategies. Teachers have to review their educational practice, as well as improve mentoring skills for students with difficulties.

Finally, this research was limited by the size of the sample, with the need to expand and work with large samples that allow statistical analysis to help relate or infer possible variables or factors with more accurately and statistical rigor. The research was conducted only with a sample of Mexico, it is important to conduct a comparative study with other universities in other countries, in order to analyze the behavior of this phenomenon and determine what could be resumed from other universities to help improve the training and terminal efficiency of these English language students.

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Dr. Octaviano García Robelo, droctaviano@gmail.com

Dr. Jorge Hernández Marquez, jhmpren@yahoo.com.mx

Master Ileana Casasola Pérez, ileana_casasola@yahoo.com.mx

Universidad Autónoma del Estado de Hidalgo, Área Académica de Ciencias de la Educación, México

Part 5

Law and Education

Elizabeth Achinewhu-Nworgu

Integrating Art and Creative Practices into a Programme of Support for Nigerian Students Studying in UK Higher Education Institutions

Abstract

This scoping paper explores the experiences of overseas students from Nigeria studying in Higher Education Institutions (HEIs) in the United Kingdom. It considers the context for these students and some of the particular pressures and challenges they experience in making the transition from education in Nigeria to achieving academic success and adapting to life as a student in the UK. With reference to the work of Professor Claudio-Rafael Vásquez-Martínez, at the outset of a collaborative project to explore these issues further, this paper considers whether the use of painting and other creative practices could assist these students in managing the transition more effectively and ultimately in succeeding in their academic studies. For the present study, qualitative data was gathered using interviews with Nigerian students who came to study in the UK with the assistance of a London-based organisation, Focus Learning Support Ltd, which assists Nigerian students in their applications to UK HEIs, and which supports them throughout their studies.

Keywords: painting, creative practices, transition, international students, academic success

Introduction: The potential of art and creative practices for enhancing students' learning

As set out in Vásquez-Martínez et al. (2015), with reference to the work of Purves (2012), we know that the operation of the left and right hemispheres of the brain is associated with distinct forms and types of thought and perception. The left hemisphere is the part of our brains which focuses on digital, lineal, logical and direct language – it is adept at analysis, mathematics and logical reasoning. The right hemisphere, meanwhile, is where we process “*images, non verbal language, paraverbal language, analog, it is the creative, dreamer, intuitive, sensitive, poet, symbolic*” (Vásquez-Martínez et al., 2015, p. 18).

Each hemisphere has its own distinct, and ultimately complimentary, modes of operation and expression. Thus, the left hemisphere is associated with verbal expression (using words to name define and describe); whereas the right uses nonverbal, yet nevertheless conscious, expression.

The left hemisphere operates through processes which are analytic (thinking in a step by step way), symbolic (using symbols to represent), abstract (taking a small fragment of the information and applying it in order to represent something), temporal (adhering to time and order in sequencing things), rational, digital (eg. using numbers), employs logic and is lineal (thinking in terms of chained ideas, one thought followed by another, leading to a conclusion at the end of the chain).

The right hemisphere, on the other hand, is synthetic (grouping things in order to make teams), concrete (capturing things as they are at the present moment), analogical (seeing similarities between things, understanding metaphorical relationships), timeless (centred in the present moment), unreasonable (not depending on facts and reason), spatial (seeing where things are and how they combine in order to form a whole), intuitive, and holistic (seeing complete structures or patterns at once).

This insight into the workings of the brain has important implications for teaching and learning. Interestingly, it is noted that different cultures and educational traditions (e.g. Western and Eastern) place differing emphasis on each type of thinking, with Western teaching styles typically devoted more to the development of left hemisphere thinking. The paper goes on to argue that the greatest achievements may occur when the two hemispheres are integrated and balanced. Indeed, it is concluded, *“an aware teacher... will develop activities to stimulate the two hemispheres in order to keep the attention of his or her student and never miss motivation”* (Vásquez-Martínez et al., 2015, p. 18).

The aim of this paper is to apply this insight to the experiences of Nigerian students studying in HEIs in the United Kingdom. These are students whose education in Nigeria typically has been very left brain oriented, with their chosen degree courses in the UK reflecting this orientation, as the most popular subjects to study are in areas such as engineering, business, law, computing, economics and so on. There are many challenges for overseas students in adapting to education in another country and the work of Vásquez-Martínez poses the intriguing possibility that integrating arts and creative practices into their learning (even though only indirectly related to their chosen discipline) may help these students in their studies. This is the central focus of this paper and the proposed further research to follow from it.

The case of Nigerian students studying in UK HEIs

Nigerian students studying overseas

Despite some economic challenges faced in African countries such as in Nigeria, education is still viewed as the key to success and national development; this has led to the government and parents investing heavily in education of the youths both at home and overseas.

The rapid growth and expansion of education programmes and activities in Nigeria since its independence in 1960, demonstrate the value that the country has placed on education. This is not just a pastime for political leaders who are trying to attract voters. It is a genuine desire of most, if not all members of the Nigerian community to acquire the knowledge and skills that are necessary for nation building. It is generally accepted that education plays a very significant role in the

social and economic development of the country. It is also the tool that can keep the country in step with what is happening around the world, and can help it to develop regional and international partnerships that are able to benefit the overall growth of the country.

Fifty six years after independence, the need for a sound education has not decreased. In fact, it is reasonable to assert that the need is much greater for approximately twenty years into independence, research reports were showing that in spite of the economic progress made as a result of the oil industry, there was a general sense of dissatisfaction with the progress made in education and other sectors (Brownsberger, 1983; Joseph, 1983). The need to bring education standards in line with commendable international standards was dire. The government of Nigeria recently initiated higher education policy reforms intended to bring its university system more in line with international good practices. The reforms promoted increased institutional autonomy, greater system differentiation, strengthened governance, and mechanisms for quality assurance. They seek to create a more flexible and responsive system of university teaching and research that, over time, will contribute increasingly to national innovation capacities, productivity gains, and economic growth.

Given that the above policy reform will make a valuable contribution to national development, it seems practical for all Nigerian students to avail themselves of situations that provide opportunities that will help them to increase knowledge and improve skills and capabilities. Opportunities to study overseas with leading HEIs are therefore crucial in helping overseas students, particularly students from Rivers State and Niger Delta regions of Nigeria to achieve their fullest academic potentials.

The choice to study in UK HEIs

Over the decades, students from around the globe have been coming to the UK to study in colleges and universities. According to the Universities & Colleges Admissions Service (UCAS), the organisation responsible for managing applications to almost all full-time undergraduate degree programmes at UK universities and colleges, in 2011, of the 1.8 million full-time undergraduate students in Higher Education (HE), over 104,000 of them are international students (UCAS, 2012). Evans (2011) reports that “UK universities educate about 2.5 million students annually, with a 28% increase in student numbers overall in the past 10 years”. These data suggest that studying in the UK is a popular choice for international students and also as means of being assured of gaining a qualification within a shorter period of time.

It is generally acknowledged by educators and researchers that the wide range of courses offered, the practical experiences gained, the new skills learned, the opportunity to study in a multi-ethnic and multi-cultural setting and pursuing courses of study in English, an international language, are some of the factors that attract overseas students to UK universities and colleges and this is paramount to Nigerian students who place a high value on a UK degree qualification. Besides, English is often referred to as ‘the language of business’, and if business is to drive economic growth, then it is vital for overseas students to have ‘English’ qualifications.

Additionally, the UK's quality assurance practices in higher education ensure that students are exposed to the most efficient and effective teaching and learning environment possible found in UK institutions, which is backed up by institutions such as the Quality Assurance Agency for Higher Education (QAA), an independent body, is responsible for safeguarding standards and improving the quality of HE in the UK (QAA, 2012).

Challenges for Nigerian students studying in the UK

Nigerian overseas students face numerous challenges – political, economic and social, ranging from mild to severe. Some of them are identified below:

- ICT skills;
- Financial barriers;
- Institutional issues;
- Culture shock;
- Integration into a new academic environment;
- Racial discrimination;
- Personal problems;
- Family issues; and
- The UK's Tier 4 immigration rules and regulations.

In short, there are a great many challenges that can make it harder for students coming to the UK from Nigeria to succeed. For this reason, many rely on the support of agencies such as Focus Learning Support Ltd (FLS) to help them overcome some of these barriers and challenges.

For example, with regards to funding and other financial issues, FLS has approached sponsors directly on students' behalf. Another example comes from the area of ICT. FLS has collaborated with colleges and universities to give additional support to students to improve students' ICT skills. Similar support is given in FLS' Saturday School to support students cope with their demanding school work and to get acquainted with the British educational system and standards.

Scoping study

Nigerian students' experiences of using art and creative practices in their studies

This small-scale research draws on qualitative data, gathered from face to face and telephone interviews, with Nigerian students studying in the UK. These students were all being supported in their studies by FLS. The following vignettes give an indication about their backgrounds and experiences in UK HEIs, as well as their relationship with FLS.

Case Study 1: Student C

I dreamt of studying in the UK when I was in secondary school in Nigeria. Coming to UK was my dream come true. However, my first year was not funny. I missed home so much that if allowed; going back should have been a choice, but when FLS visited our College with the Chairman. Their presentation to us was like a medicine to the cure of my home sickness. The support and courage picked me up and the most important was working with them until I finished my first degree and

progressed to Masters. I came for first degree in Oil and Gas, within the four years of my award and with the support from FLS, I obtained two degrees.

Case Study 2: Student X

Like every other student that has just arrived from Africa for the first time, I faced many challenges. These challenges were mainly centred on adapting to both social and educational life here in the United Kingdom. This was mainly as a result of the wide difference between the African and the British society... The challenges I faced was very much reduced when I was introduced to the Focus Learning Support Limited. This company was already established in the UK and was noted to have helped Nigerian students to adapt to life in the UK. My meeting FLS was a dream come true... FLS ensured that I received my allowances from my state Government when due. After I had finished my university foundation programme, they helped to secure admission in the University of East London... I have benefitted immensely from FLS.

Case Study 3: Student Y

I came from Nigeria as a mature student with no ICT skills. I found it rather difficult to cope with my studies because I had to use computers to do my assignments and class presentations. In fact, everything I did revolved around ICT. This made me very unhappy. FLS came to my rescue by giving me extra support at its Saturday School and the European Computer Driving Licence (ECDL) from the University of East London.

Case Study 4: Student Z

FLS has been very helpful to me. When I came to the UK, I got frustrated because I needed financial help and academic advice. I thank God I met a friend who requested I should contact FLS. I then checked online and eventually had contact with Dr. Elizabeth, whom I fondly call "Helper" because of how she salvaged the situation. Since then I have never failed to contact FLS whenever I face any challenge. I recommend that Nigerian students take my advice and contact FLS for any academic problems or to get other advice that they may require.

These quotes highlight not only some of the typical challenges faced by Nigerian students attending UK HEIs, but also the way in which an organisation like FLS is uniquely placed to implement innovative approaches that could help such students even more in the future.

Artistic and creative aspects to the students' courses

As part of the interviews, the students were asked about the extent to which artistic and creative practices (eg. drawing, painting) were part of their previous or current academic experience. The following are some answers that were given to this question:

Student J

My course which is engineering has a module that requires us to practice drawing and painting or some element of art work that already exists. This is what we call initiative drawing which was the first drawing I experienced on my course based on specification to improve original work presented to us in a group or as an individual. In a situation of this nature, you would look at either an object or a design of an artwork the teacher presents to you. The role of the student or group of students will be to redesign the work, which will require you to think, generate ideas

and be creative and describe what you have presented or the meanings. I found it very difficult but interesting and challenging task.

Student K

I can recall a group work we did in my foundation days at Anglia Ruskin Cambridge. It was an engineering work that involved drawing, where the teacher gave the group an experience of imagining what a car will look like in 2030 to 2040, transportation and communication which required imagination and generation of ideas that originated from the work. As a group, we met twice a week, thinking and imagining the nature and feature of the cars for two weeks to come up with the ideas. This work involved drawing, design and painting of the look of the nature of the car in 2030-2040. In fact my course has always involved creativity, talent development and imagination which I find here studying engineering easier compared to when I was in Nigeria.

Student L

Civil engineering course allows you to imagine a building on a non-friendly ground where Earthquake is likely to happen or in a contaminated land. You have to imagine and calculate the implications of putting up a building in a place like this, the need to think of a remedy are all based on imagination and generation of ideas to proceed with a situation of this nature as a civil engineer. I learnt how to think fast and design or draw a building in an Earthquake land with remedy to uncertainties.

Student M

In my last assignment, I was asked to imagine development of robots and how intelligent it would be in the next decades with its rapid increase. Here I had to use my imagination and thinking to create a robot – computer artificial intelligent and their likelihood of replacing human beings in their jobs. This was also related to the rapid growth and what technology can do in the future. Examples such as building a tunnel under a bridge, the new TBM is now used for speed for a job that could take human being weeks to accomplish. My studies in the UK have exposed me to acquiring both the practical and theoretical skills that I never would have done studying back home, especially with the facilities not available to see and carry out the real work.

As the above quotes represent, all of the students were able to come up with examples of where creative practices had been a part of their studies in the UK. For many this was a relatively new experience, as this aspect of learning had not been a strong feature of their high school education in Nigeria. It could therefore be quite challenging; and these initial insights suggest that there could be much benefit for these students in creative practices being integrated into their package of support from FLS (much as students with limited previous access to ICT are provided with extra computing lessons).

Conclusions and further development

This initial scoping paper and research suggests that there is a great deal of potential in exploring the provision of a new strand of support to Nigerian students studying in UK HEIs, namely providing them with opportunities for developing their creative and artistic skills. In this way, they will not only adapt more readily to the practical elements of their courses that involve, for example, elements of

technical drawing. It is speculated that this balancing of left and right brain activities might also make them more creative and effective problem solvers and analysts; in short, more well-rounded and capable individuals. It is further speculated that involvement in creative and artistic practices might bring further benefits, such as a valuable form of stress relief and new avenues for socialising and developing social support networks. The benefits may not be limited narrowly to the academic sphere, but extend to these students' wellbeing and happiness.

These are questions for further exploration through more systematic action research with students engaged with FLS. The purpose of Focus Learning Support (FLS) is to educate and empower students, families and interested persons by bridging the educational gaps that prevent them from realising their fullest potential. FLS emphasises that educational development is a lifelong learning venture that merits continuous support from various societal organisation and institutions. To this end, FLS, with assistance from community alliances, embarks on a variety of teaching and learning activities to help it to fulfil its aims.

The objectives of FLS are to:

- Encourage learners to pursue educational goals;
- Provide all students with the guidance they need to pursue specific courses of study;
- Incorporate current educational philosophies and initiatives into all learning programmes;
- Revise content, objectives and resources if necessary, to keep in line with educational trends;
- Build on what students have already achieved;
- Imitate good practice;
- Strive to maintain a quality 'culture';
- Establish learner-friendly environments.

Currently its main activities can be summarised as:

- Recruitment of international students;
- Saturday School;
- Educational TV Programmes;
- Panel discussions;
- Tutorials and supervision;
- Seminars and conferences.

FLS operates within the framework of the above objectives and activities. It recognises that it is impossible to be efficient and productive without assistance from members of the Nigerian community in the UK, support from concerned members of the UK society and community organisations from both communities. FLS is therefore making 'selected' individuals and community groups and organisation an integral part of its activities. In this way it places itself in a better position to contribute to the regaining of high educational standards in Nigeria and eventually to national development that will give the nation political, economic and socio-cultural significance in a competitive world.

An action based research project undertaken by FLS, with voluntary participation by students from Nigeria wishing to be part of this initiative, is both practically possible and in close agreement with the guidance principles and

objectives of FLS. In conjunction with Professor Claudio-Rafael Vásquez-Martínez, it is proposed to develop a strand of artistic and creative practices to supplement the other forms of academic and non-academic support provided by FLS. The impact of this intervention will be monitored through action research with the participants, who will be encouraged to reflect and report on the project and any ways in which it may have helped them in their learning.

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Dr. Elizabeth Achinewhu-Nworgu, Birkbeck University of London & Focus Learning Support Ltd, United Kingdom, focuslearningsupport@gmail.com

Elizabeth Achinewhu-Nworgu

Comparing Student Retention in a Public and a Private College: Implications for Tackling Inequality in Education

Abstract

I became interested in inequality in education and academic achievement from my youth, after I attended the first year of my secondary school in a rural college. However, I was also privileged to attend an elite college from year 2 of my secondary schooling, having changed from the rural college to a city college in the 70s. I realized, from these experiences, the potentially huge impact of inequality in the education system in relation to quality and standards. It was from this experience that I came to fully appreciate why some parents choose to send their children to particular types of school to achieve good qualifications; and why others send their children to a public college. I also made a promise to myself that I must be a teacher with the hope of supporting student retention and achievement.

The purpose of this paper was derived from my previous work on student retention, and to share my experience working in elite and public colleges in London; the inequality and difference observed in teaching on their higher education programmes. My main aim in carrying out this research was to compare the difference in retention strategies in relation to private and public colleges, for which I employed qualitative research methods, observing the difference in college practices. Interviews were also conducted with few parents to ascertain their reasons for choosing either public or private colleges for their children.

The findings show that both the private college and the public college used for the study have good practices in education and in their retention strategies. However, the private college had higher retention and achievement rates compared to the public college. Bringing together my experiences of teaching in these colleges for a short period, and my previous research work on key retention strategies, I carried out this mini study to explore this particular aspect of inequality in education; and how can institutions work together to eliminate inequality in education.

Keywords: student retention, public college, private college, inequality in education

Introduction: Context

The main aim for this work was to develop my previous work on student retention, an area that I have always had a passion for, and also as a result of my experience in attending a Rural college and an Elite college with clear differences in quality and standards. Following this, I was interested in comparing two subsequent experiences as a teacher, when I started teaching in 1995 at a City College of Further Education in London and a college in a deprived area of London. I became interested in the differences in retention of students in a city college compared to a deprived college, and in students' motivation to engage in serious studies and learning. Hence, I began to think of the best approaches to helping students engage in serious academic studies that will enhance their future career development. In this research, the focus is to compare retention strategies and quality of education in both

public and private colleges based in inner city London. It will also raise the question as to why some rich parents choose to send their children to a private school as opposed to public school. It explored strategies that the business and law departments, where I taught on their higher education programmes, used in motivating students to engage in effective academic studies in both the private and public school settings.

Literature

There has been a body of research and literature focusing on students' retention and achievement with the main factors leading to it being identified. Many factors have been identified in the literature to contribute to students being retained to achieve academic success. The work of Cottrell (2003) identified different skills of success which students should implement in their studies to achieve the best results and the best degree at the end of their course of study. Student motivation was one of the factors that were identified to encourage students to achieve academic success; success is associated with high levels of motivation. This is in line with the thesis work of Achinewhu-Nworgu (2007) with motivation being one of the strategies for students' retention in FE colleges. For this reason, it is useful to be clear about what is likely to motivate students to aspire to achieve academic success.

Hawley and Rollie (2007) also support the argument that motivation and personal goals are factors that promote learning and student success. They commented that: "Motivational or affective factors as intrinsic motivation, personal goals, attributions for learning, and self-efficacy, along with motivational characteristics of learning tasks, play a significant role in the learning process" (p. 20). Others have also highlighted the importance of motivation in supporting student retention and success (Achinewhu-Nworgu, 2009; McGivney, 1996; Barwuah, Green & Lawson, 1997; Miller, 1990). Alongside motivation, it is also important to recognize the contribution of other factors such as students' prior educational experiences (Martinez, 1995); financial pressures on students (Swail, Reed & Perna, 2004); integration with other students within the college environment (Tinto, 1975; Swail, Reed & Perna, 2004); and demographic factors such as gender, age and ethnicity (Swail, Reed & Perna, 2004; Golden et al., 2002; McGivney, 1996).

Other factors identified in the literature to trigger off motivation to achieve a degree are aspirations for a career. Race (2007, p. 13) supports the idea that a good degree is essential for career and that studying a degree often puts students in a better chance of getting the best job and also graduates are likely to get paid at least a quarter more in terms of income as opposed to non-graduates.

The literature on poor academic success makes repeated reference to students' perceptions of teaching and learning as an important influence on their participation and decision to stay to complete a particular course (Morgan, 2001, p. 15), (Achinewhu-Nworgu, 2009), and therefore is an area if not effectively improved can have an impact on academic achievement and completion regardless of whether that is in private or public institutions. Martinez in his research on strategies promoting student retention and achievement identified tutoring and financial support as means to support students and leading to their success in education (Martinez, 1997, p. 63).

Khan (2006) discusses the need for people to understand their learning style. Most people have different learning styles, some are audio learners, some are visual

learners, some enjoy learning through touching and feeling activities – it is essential that teachers recognise the need to address learning styles that can help students to be retained and hence achieve academic success. Having explored a brief literature on factors contributing to students' retention and achieving academic success; this small scale research study aims to compare and contrast the difference in students' motivation strategies in private and public colleges in inner city London and why parents decide to send their children to private colleges instead of public colleges. The research sought to address the following questions: Why is there inequality in the education system? Why do parents, chose to send their children to either a public or private college? What differences are there between public and private colleges in their approach to student retention? Are privately educated students more motivated to achieve academic success than the students in the public colleges? What are the implications for inequality in education?

The focus is to further explore these factors in details to ascertain how the students in private and public education institutions perceive the difference in their motivation to achieve academic success in either private or public colleges.

This work did not privilege one particular theoretical perspective, but drew upon a wide range of theories and research that has been applied in the area of issues around reasons why students are retained, achieve or do not achieve in certain institutions. As the mini research aimed to have a very practical focus on examining the difference students make in their studies being in a private college as opposed to a public college, it is important to link the practical issues to theoretical perspectives as the contributions made by the work of Cottrell (2003, 2005), Harrold (2006), Hawley and Rollie (2007), Swail, Reed and Perna (2004), Race (2007)), Yorke and Longden (2004). Achinewhu-Nworgu (2009), Tresman (2002), Martinez (1997, 2002), Johnston (2001), have all explored reasons why students are committed to their studies linked to institutional retention strategies. Attention also needs to be paid to the important connections between the different strategies which work together within a package of measures. Beatty-Guenter's (1994) work on different types of retention strategy – based around the four processes of '**sorting**', '**supporting**', '**connecting**' and '**transforming**'. This work offers a different way of looking at different factors contributing to students' academic achievement and I have applied this perspective in analysing my data gathering for this work.

My research therefore focused on comparing and contrasting the difference in students' retention strategies in private and public colleges in inner city London and why parents decide to send their children to private colleges instead of public colleges.

Methodology

The process of data collection for this research used a combined quantitative and qualitative approach that focused mainly on observation of the practice of education and comparing the difference between working in an elite college compared to a public college. This involved the planned use of two or more different kinds of data gathering and analysis of techniques, where 'what is importantly mixed... extends beyond the numerical/quantitative or narrative/qualitative character of the different methods used' (Greene et al., 2005, p. 274). In this approach, there is an attempt to integrate the different methods within a single framework and set of

priorities specified within the overall research design – although there are many different models for combining qualitative and quantitative methods and no ‘right’ way of doing this (Achinewhu-Nworgu, 2007; Punch, 2005). The value of combining methods is that it allows for the triangulation of data (Punch, 2005), recognises the similarities between qualitative and quantitative approaches (Blaxter et al., 2001), is less constraining than relying upon a single method (Morse, 2003, p. 195) and, crucially, strengthens the findings that are produced.

The work as indicated above mainly focused on participant observation of good education practices and the difference experienced, teaching in a private college compared to a public college. In additions, some parents’ opinions were captured at parents’ evenings and through other contacts. The research explored the quality of teaching and learning, students’ motivation, support, the college environment and the difference in students’ retention and achievement in both colleges.

Unfortunately, I was not able to directly explore students’ perceptions on their motivation to study in a private college or public college. However, the length of periods stayed and what I observed of the group and institutions enabled my conclusion on the difference it makes to be in a private college compared to public college.

Findings

The findings of this work clearly identified the difference and inequality in educating children in private colleges compared to public; and also, the reasons why some students drop out without achieving academic success. Another point noted was that the quality of teaching and learning was found to be more intensive and academic than vocational in the private college compared to the public. Teachers have good attendance and punctuality records as well as the students; all the teachers are highly paid compared to public hence their motivation to deliver effective teaching and learning was very high, with high standards set for students’ retention and achievement. Both the teachers and students were given good incentives, such as free breakfast and lunch, which motivated them to be punctual to lessons in the private college compared to the public college where teachers and students bought their own food. In terms of working environment in the case of private college, rooms were smaller but very cozy compared to the public college.

In the area of motivation, there is a big difference between students in the private college compared to students in the public college. Students in the private college were more disciplined, hardworking and have respect for teachers. In the terms of support, private students are more independent and dedicated to achieving compared to the public college. The findings in my observation, indicates that the quality of mathematics, English, science, arts and design teaching and resources are generally higher at private colleges than at public colleges.

Talking to a parent on why she chooses to send her daughter to a private college, she said:

My daughter wants to study medicine; she needs good grades in science subjects to make it to medical school. We can afford her fees; she needs to come to a good school like this to achieve her grade. She is doing extremely well and we are very happy. You can’t get what she is getting here in public school. We can tell the difference. However, she can be over worked here as the course demands. (P1)

Another parent reflected similar views on the advantages of private over public education:

My son went to public school; he did not get the result he wanted to doing his dream course. However, our option was to bring him to this school for him to improve on his maths and English. We made the right choice which he really appreciates. There is a great difference. It cost money but more to gain in private school than public. I am not condemning the public school but there is a difference in his motivation, discipline and achievement. (P3)

However, parents like the following, had found reasons to favour the public college over a private education:

My son attends this college because it is a very reputable public school on top of the lead table. The problem here is getting in due to long queue. Why should I spend £60,000-£70,000 when he can get same in this college. I am very happy with his grades and performance so far. I am convinced that he will make it to the best university. He has to prove himself not because he is in private or public college. It depends also more on his motivation and dedication to achieve. That is my opinion. (P5)

Sending my son to a private school was for him to be disciple and have the manner that will help him to achieve his career in Oil and Gas industry, his career dream. For us, sending him to private school was opposite because he missed all his friends and was never happy. He performed badly and was asked to repeat the whole year which costs £27,000 per year. I could not do it so he went back to public school and did very well in his maths and English. I believe that when a child is motivated to work hard and with good teaching, they will do well regardless of whether they are in public or private school. They also need the support of parents to guide them in the right direction which they make not fully get in college whether private or public. (P6)

Conclusion

The finding of this mini research shows the difference between private and public school based on literature and findings from parents. The most important experience gained was the fact that, the private institutions are still seen as the best by the community and therefore can only be available to the rich parents. On the other hands, public school still remains for the working class and lower class.

Overall, the private college had better quality teaching and learning, with students and staff more motivated to achieve to a higher standard and successfully complete the courses of study. Not surprisingly, with all of the advantages and improved resources in the private college, student retention rates were considerably higher than in the public college. However, the comments of parents of public college students indicate that a private college education does not work for everybody, and that their children's happiness, retention and ultimately their academic success rested on a wider set of factors than resources and teaching and learning quality alone. In these cases, the **wider support and encouragement of the students' peer group and parents** were crucial to their motivation to succeed and complete their courses.

Whether teaching in a public or a private setting, this mini research underscores the importance of considering student retention in holistic way and looking at interrelated factors that can support student retention (Achinewhu-Nworgu, 2007).

We also need to look at how factors promoting or inhibiting student retention contribute to ‘**sorting**’, ‘**supporting**’, ‘**connecting**’ and ‘**transforming**’ the student. Superior teaching and learning, educational resources, and support facilities, clearly give a strong advantage to students in private colleges. But this can be compensated for, or offset, by the influence of friends, parents and other role models. Despite the inequality in resources and funding, there may be much to be gained for both private and public colleges in sharing good practices and approaches to supporting student retention, particularly those that develop holistic approaches and solutions. Joint CPD and sharing or practice between teachers from different types of institutions in this area could be extremely beneficial to both private and public based teachers and managers of education.

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Dr. Elizabeth Achinewhu-Nworgu, Birkbeck University of London & Focus Learning Support Ltd, United Kingdom, focuslearningsupport@googlemail.com

Vimbi Petrus Mahlangu

Legal Understanding of *Quid Pro Quo* Sexual Harassment in Schools

Abstract

Paper highlights legal understanding of quid pro quo sexual harassment in schools. Quid pro quo sexual harassment implies abuse of authority or position to gain something sexual. A duty of care rests on teachers, Schools Governing Bodies and the Department of Education to provide and maintain safe schools that are free from all forms of victimisation and abuse. However, there seems to be an abuse of power by all those who are supposedly to protect learners in schools. Paper used an abuse of organisational power theory and conceptualisation framework as a lens used in analysing various forms of victimisation and abuse with an effort to provide a better understanding of behaviour that amounts to abuse. Paper concludes with guidelines for handling harassment and bullying in the school contexts.

Keywords: ridicule, bullying, abuse, sexual harassment, sexual violence, human rights, victimisation, duty of care, quid pro quo

Introduction

When looking at the international perspective, South Africa is not the only country experiencing sexual harassment in her schools. In one way or the other in many South African schools, teachers have sexually harassed or abused the learners in their care. This serious human rights violation is widespread and well known. Sexual violence by teachers against learners in South African schools is a serious human rights violation. Sexual violence by teachers against learners is a disquieting reality, impeding a learner's personal autonomy and right to education (Centre for Legal Studies, 2014).

Violence manifested itself into schools and learners became the victims of the circumstances. Bullying, harassment and other forms of victimisation and abuse are forms of violence that are widespread in schools and cause physical, harm but often also cause psychological, emotional, and mental harm to learners (De Wet, 2016). At times teachers are blamed as the perpetrators of sexual harassment on learners. Female learners are more likely to be vulnerable to sexual harassment from male teachers (UNESCO, 2015). Ngcobo et al. (2012) exposed that within schools male teachers are the perpetrators of sexual harassment directly or indirectly by promising better grades or marks, money or dating relationships. In a 2001 study by Human Rights Watch in South Africa, 37 rape survivors (7%) indicated that a school teacher or principal had raped them (Human Rights Watch, 2001). The report of the Human Rights Watch (2001) indicated that in some cases female learners agreed to satisfy teachers' sexual demands because of fear of being physically punished by teachers if they reject their advances.

According to Timmerman (2003) in countries like the United States of America, Netherland, Morocco and Surinam teachers are the perpetrators of sexual abuses by abusing their powers. Based on these international experiences South African government through her School Governing Bodies tried to ensure that school safety is guaranteed in schools by developing policies. If not properly governed schools may adopt unlawful school policies discriminating against learners in schools. For example, School Governing Bodies of two public high schools in the Free State Province (Harmony High School and Welkom High School) adopted pregnancy policies that required the exclusion of pregnant learners from attending the schools for a specific time (Prinsloo, 2016).

Method

A qualitative approach was employed in trying to understand the concept of *quid pro quo* sexual harassment in schools. Information was collected by means of a literature review and desk-top research.

Problem statement

There appeared to be an abuse of power by teachers on learners as a result of *quid pro quo*. *Quid pro quo* sexual harassment implies abuse of authority or position to gain something sexually (De Wet & Oosthuizen, 2010). It occurs when the victims felt that they had something to lose if they do not submit to sexual conduct. Effective teaching and learning is gradually undermined by a culture of school-based harassment and violence and this is an issue of national concern (Ncontsa & Shumba, 2013). For example, a 17 year old grade 11 learner of XXX Secondary School in KwaZulu, Natal Province, was seen in a video in different sex positions with the 45 year old teacher and the learner appeared to be pregnant on the footage. The young girl had admitted that she was in romantic relationship with the teacher.

Theoretical argument

Paper relied on the theory of abuse of organisational power as a lens in understanding victimisation and abuse in schools. Within organisations people have different levels of access to power positions (Timmerman, 2003). In schools principals have power over teachers and teachers have power over learners. Based on this hierarchical authority some teachers are tempted to propose love to learners. Kheswa (2014) is of the view that female students who date older men or “sugar daddies” stay in those relationships because they are characterised by money to pay for their fees and alleviate poverty and contribute to their social status.

Literature review

Sexual harassment

It is an unwelcome hostile or intimidating behaviour in particular speech or behaviour that is sexually aggressive or intimidating based on attributes such as race, gender, religion, age, colour, national origin, ancestry, disability, sexual

orientation, or gender identity (Resnick & Farrel, 2016). Sexual harassment can be explained as harassment that is sexual in nature, including unwelcome sexual attention and behaviour, sexual coercion or sexual bribery (De Wet, 2016).

Sexual violence

It is any sexual act or attempted sexual act using intimidation, threats or physical force. In schools this could include sexual harassment, assault, forced sex or rape, sexual abuse and sexualised touching of another's intimate parts or forcing any person to touch any person's intimate parts (Coetzee, 2012). Intimate parts include the mouth, primary genital area, groin, inner thighs, buttocks, breasts, as well as clothing covering these areas. Prinsloo (2006) found that many girls experienced violence in schools. They were raped, sexually abused, sexually harassed and assaulted by male learners and teachers. They were harassed by the possibility of unwanted pregnancies and emotional pressure, and were denied of their self-respect. Mason-Jones, De Koker, Eggers et al. (2016) view sexual violence as any behaviour within an intimate relationship that causes physical, psychological or sexual harm to those in the relationship. It can include humiliation, intimidation, physical and sexual violence such as slapping, beating, forced sex or other forms of coercion, and can result in severe injury and death. Chikwiri and Lemmer (2014) view sexual violence as violence or abuse by an adult or another child through any form of forced or unwanted sexual activity where there was no consent and is often associated with physical or psychological violence.

Safe schools

Safe schools are schools that are physically and psychologically safe and allow teachers, learners and non-teachers to work without fearing for their lives (Masitsa, 2011). A safe school is therefore seen as a place where teachers teach and learners learn, and non-teachers work in a warm and welcoming environment, free of intimidation and the fear of violence, ridicule, harassment and humiliation.

According to Kheswa (2014) another form of sexual harassment is *quid pro quo* harassment. *Quid pro quo* harassment usually takes place when a female learner is forced into having sex with her teacher(s) under the threat of failing a subject. Prinsloo (2006) asserted that *quid pro quo* harassment occur where an owner, employer, supervisor, member of management or co-employee undertakes or attempts to influence or influences the process of employment, promotion, training, discipline, dismissal, salary increments or other benefits of an employee or job applicant in exchange for sexual favours. According to De Wet and Oosthuizen (2010) *quid pro quo* sexual harassment implied abuse of authority or position to gain something sexual. It occurs when the victim feels that s/he has something to lose if s/he does not submit to sexual conduct. It is alleged in studies that in some schools teachers give female learners whom they abuse sexually high marks, money particularly during school trips.

According to De Wet (2016) Gender-based harassment (as defined by the *Equality Act*, SA, 2000, Section 1) referred to unwelcome behaviour that is related to sex, gender, sexual orientation, pregnancy, virginity or marital status. Gender-based harassment encompasses generalised sexist statements and behaviours that convey insulting, degrading and/or sexist attitudes that undermine the status and

integrity of girls and women, or unreasonably deprive girls and women of opportunities afforded to boys and men. Sexually coercive men tend to view gender interactions as based on rules and scripts that are somewhat exploitative and sometimes ignored. In this regard, males could use force or aggression to get sex that might lead to rape (Kheswa, 2014). According to Ngcobo et al. (2012) sexual harassment was seen as 'normal' and difficult to challenge. Thus they chose not to act. This could also mean that females have internalised violence and accept it as normal. This is the reason why many cases of sexual assaults are not reported in schools.

A hostile sexual harassment may also create a hostile atmosphere in a school where learners' academic performance might be affected (De Wet & Oosthuizen, 2010). Sexual harassment in schools can also create a hostile, intimidating or offensive environment for the victims. Teachers by virtue of their profession and by law are obliged to maintain discipline in schools and to act *in loco parentis* in relation to the female learners (Masitsa, 2011). Teachers as trained professionals ought to refrain from harassing and intimidating learners. They are expected to care and maintained the safety of learners under their supervision and care. In Zimbabwe female students' poverty provides ideal pre-conditions for sexual bartering (Masitsa, 2011).

Different forms of harassment

Harassment is often power-based. De Wet (2016) came up with the following forms of abuse, namely: verbal; physical; nonverbal; emotional; relational; secondary; discriminatory; child abuse; and a hostile or unwelcoming environment abuses. Abuse and victimisation in schools can manifest itself in various forms. Here a brief explanation will be provided of the abuses that can be found in schools. Verbal bullying or harassment involves hurtful words and includes hurtful name-calling, persistent teasing, ridicule, taunts, gossip, threatening, vulgar language, remarks or jokes of a racist, homophobic, islamophobic, religiophobic, sexist or xenophobic nature, teasing someone about their disability, name-calling, sexual jokes, unwanted conversations of a sexual nature, whistling, crude comments (for example about body parts), spreading slanderous rumours about someone, hate speech and asking for or pressurising for sex.

The effects of sexual harassment and bullying on learners

The victims may suffer pain such as body injuries. De Wet (2013) is of the opinion that pain and suffering as injury to bodily integrity occur when sexual harassment results in physical injury and always in the case of sexual violence. Neetling et al. (2006) is also of the opinion that pain encompasses past and future physical and emotional pain. It has been found that the persistent and threatening nature of abusers' behaviours often cause deterioration in victims' quality of life. These behaviours can cause considerable mental health problems such as depression, anxiety, suicidal ideation, post-traumatic stress disorder and feelings of fear, terror, helplessness, distress, anger and distrust that often last many years after abusers had ostensibly disappeared (Korkodeilou, 2016). Adolescents seem to have higher risk of developing Post Traumatic Stress Disorders (PTSD) after violence victimisation compared with adults. Moreover, youth suffering from different types

of victimisation report more mental ill-health than youth suffering from repeated victimisations of the same type (Palm, Danielsson, Skalkidou, Olofsson & Högberg, 2016).

Psychological consequences of sexual harassment or violence are often more serious than the physical injuries (Field, Jeffries, Zoe & Lynch, 2016).

In contemporary China, both socio-cultural norms and current legislation encourage women to not to report marital rape; instead it should be viewed as a family's private matter that needs to be confined within the four walls of the home (Chi, 2016). This creates a vicious cycle of sexual abuse for the victims of rape in China. Teachers are expected to be able to protect learners from the harms of witnessing violence perpetrated against them as evidenced through Weisz and Wiersma's (2011) U.S. study showing a broad consensus that mothers should be held accountable for not protecting their children from witnessing their abuse even when they cannot stop their partners from abusing them (Morgan & Coombes, 2016).

Handling of sexual harassment in schools

Schools should have mechanism in place for handling the specific cases of sexual harassment. When the victim is a child, the cases should be referred to the statutory legal system and not be handled through the customary courts. In cases where a tangible proof can be submitted against offending teachers and principals the Department of Education with the authorities should take more concrete action, for example through immediate dismissal of the offender (Devon, Sayndee & Bøås, 2016).

- Establishment of a comprehensive communications strategy to educate the school community about sexual violence and sexual assault, as well as to raise awareness about school programs;
- Mandatory training programs to educate learners, teachers, and district office personnel about prevention and response to sexual violence;
- Establishment of services for individuals accused of sexual violence (Napolitano, 2014);
- “Ensure that learners are always alerted to the legislation and policies governing sexual violence in schools by teachers;
- Create a safe space where teachers can report colleagues without fear of their own reputations being damaged;
- Impose strict internal disciplinary measures for teachers who are perpetrators of sexual violence;
- Share the outcome of the disciplinary measures with teacher unions” (Centre for Legal Studies, 2014, p. 48).

Conclusion

Schools should educate all learners about all behaviours that constitute sexual violence, bullying and harassment. This would assist them to have the legal understanding of victimisation and abuse in schools. Teachers should act ‘*in loco parentis*’ (act in the place of a parent) in assisting learners in identifying all forms of victimisation and abuse in schools.

Teachers should understand their duty of care and to ensure that learners have the legal understanding and abuse that might occur to them while in schools.

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Prof. Dr. Vimbi P. Mahlangu, University of South Africa (UNISA), South Africa,
mahlavp@unisa.ac.za

Part 6

Research Education

Lynette Jacobs

Burke's Dramatism Framework: A Lens to Analyse Bullying

Abstract

Bullying is rife in schools across the world, which has emotional, educational as well as financial implications. Research suggests that the way in which bystanders, and in particular adults, react to such incidents is pivotal in curbing this problem. While a dearth of research focuses on the victims as well as the perpetrators of bullying, one should not ignore how different interactions between role-players influence the situation. The purpose of the paper is to explore the extent to which Burke's Dramatism framework can be used as a lens to gain insight into how role-players respond to bullying incidences, and how this contributes to the drama. I use a series of email discussions with the mother of a bullied child as a case study.

Keywords: school violence, victimisation, case study, bystanders, child abuse

Introduction

Around the world, learners are bullied. Bullying differs from other forms of violence in that the harm done to the other is intentional, repetitive and the result of a power imbalance between those who engage in such acts, and those targeted. Bullying can take various forms, including physical, psychological and verbal attacks; it can have a sexual nature and occur directly or in cyberspace (Gutt & Randa, 2016). Bullying has unfortunate consequences for both victims and perpetrators. Victims feel isolated and rejected, their self-esteem is affected, and it can lead to depression and suicide attempts (Esbensen & Carson, 2009). Perpetrators often develop into disagreeable adults who might engage in criminal activities (Smokowski & Kopasz, 2005). Sigurdson et al. (2015) found that both victims and perpetrators have a higher chance to experience mental health problems in adulthood. Role players in schools thus need to acknowledge the problem, truly understand the phenomenon and be committed to implement strategies to curb this problem. The Center for Health Promotion and Disease Prevention (n.d.) found that the cost benefits of preventing bullying are at a health care level (possible medical costs for mental problems), an educational level (retaining children to complete school) as well as a societal level (children have a better chance of becoming productive citizens when they complete school).

Statement of the problem

Many strategies exist to counter bullying, for instance the Olweus Bullying Prevention Programme (Hazelden Publishing, 2016) and in some countries, such efforts are paying off. A longitudinal study in Italy over eight years found a downward trend in occurrences. Vieno et al. (2015) claim that this might be the result of purposeful engagements with the problem, increasing awareness, and an understanding that it is a broad-ranging issue of concern to both the schooling system and public health. Similarly, a cross-sectional comparative study of data from 1996 to 2011 in Nordic countries showed a decline in bullying reported in the survey. The differences were however only statistically significant in Denmark, while Iceland did not show a decline. Still, the study showed that close to 20% of parents overall indicated that their children are being bullied at school, with immigrant learners being bullied significantly more than their peers (Bjereld et al., 2014).

These studies are however, not without flaws. Vieno et al. (2015) admit that although the Italian statistics show a decrease in bullying activities, it cannot be ruled out that respondents referred to other types of bullying (e.g. cyber-bullying) not measured by the instrument. The study conducted in Nordic countries was based on parents' responses, and again, the authors pointed out that this result could either be indicative of a real decline, or that bullying "has moved to arenas where the parents are less aware" (Bjereld et al., 2014, p. 596). A study in Romania comparing data from 2006 with that of 2010, indeed shows an increase in the prevalence of bullying amongst 11-15 year olds (Cosma & Baban, 2013).

In South Africa, the Department of Basic Education has issued a number of documents aimed at preventing bullying and most schools have an anti-bullying policy. Many schools spend a significant part of their budget on security services and equipment to monitor the safety situation. Still, the regularity with which the media as well as researchers report cases of bullying, suggest that the problem persists (Jacobs & De Wet, 2014) although much about the problem is known.

Many studies focus on the characteristics of victims (Bjereld et al., 2014), on the effect on the victims and perpetrators (Sigurdson et al., 2015), and on the effectiveness of programmes to prevent it (Vahedi et al., 2016). Others look at the crucial role of bystanders showing empathy (Polanin et al., 2012). Horton (2016) however argues that in primarily highlighting and labelling the roles of the individuals involved the wider contexts become obscured. As important as the roles of the individuals are, a need exists for a theory that simultaneously looks at the individuals in the dramas that plays itself out, and at the factors that set up the scene for such dramas.

A variety of explanations underpinned by different theoretical positions exist identifying genetic, biological and/or neuro-psychological attributes of individuals as the foundation of the problem. An example is Bjereld et al. (2014) who link learners with Attention Deficit Disorder with bullying incidences. While I do not dispute that certain characteristics in individuals make them more prone to aggression, I reject the notion of individuals as products of mere genetics, unable to make decisions and choices regarding their behaviour. There is substantial support for the ecological model to understand bullying that allows the exploration of the relationships between bullying behaviour and a variety of attributes such as

biological factors as well as social structures (see Hornby, 2016). However, it does not focus on the way in which role-players make sense of bullying, interpret situations and respond to it. Thus, in order to make sense of bullying, in this paper I explore Burke's Dramatism framework (Burke, 1969) as a means to account for the interplay between different role-players, and the environment, towards understanding the phenomenon.

Burke's Dramatism

Burke's Dramatism theory enables us to reflect on human behaviour and the motives for bullying (Krauss, 2006). Burke (1969, p. xv) proposes a pentad of terms to help us explain what people are doing and why they are doing it. The five aspects he investigates are *scene*, *purpose*, *agency*, *agent* and *act*.

When exploring the *act of bullying*, different types can be studied while the term *scenes* refers to different contexts in schools and communities. This model adds an important dimension to research on bullying as it also considers the *purpose* or motives of the actors or agents involved as well as the methods and props (*agency*). It also permits multiple interacting factors, role-players, events and processes to be studied. It lets the focus move from one actor to the other and the interactions between different actors. It allows for ambiguity and inconsistencies and acknowledges that no two things or situations are alike (Burke, 1969).

Burke (1969) explains that the five principles must not be seen in isolation but rather in relation to the each other, in what he calls "ratios". The most significant ratios are the "scene-act" ratio, and the "agent-scene" ratio. Järvinen and Miller (2014) explain that these ratios provide a logic to connect events, places and people into a particular social reality. This opens up possibilities to uncover "multiple truths" (Fox, 2002, p. 371) and various perspectives.

In relation to bullying, Dramatism provides us with a means to view the school ground, classroom, sport field, etc. as stages on which a drama is played out, complete with actors (antagonists, protagonists and minor actors), setting, purpose and plot. The ratios also make us aware of the ways in which different elements influence and intensify each other during acts of bullying (Fox, 2002).

While Krauss (2006) suggests that Burke's Dramatism model could serve as a grand theory for violent behaviour in schools, I do not intend to pursue or reject this claim in this paper. I intend to use it as a framework to gain insight into the dynamics of bullying in schools, and specifically to analyse the written narration of a mother on episodes of bullying that her son experienced.

Empirical investigation

In order to explore to what extent Burke's Dramatism can provide insight into incidents of bullying at schools, I follow a narrative research approach to explore the written text of Susan, the mother of John (pseudonyms used), a primary school learner from a small town who had contacted me for advice. Susan gave permission for the content of her emails to be used for research purposes. I translated it and Susan checked that the translations was accurate.

I do not claim that the narration reflects a variety of viewpoints or a bigger truth, rather as text which as Burke (1966, p. 45) explains, is a "selection of reality". The

mother selected what to share, and what not to share, and I infer the positions of others, where required, based on the text only. In the discussion below, I will provide extracts from Susan's report, and apply Burke's pentad to interpret it. After completion of the draft paper, I sent it to Susan for a member-check where she had the opportunity to assess the accuracy of the interpretations (Merriam, 2009).

The drama

The different *actors* (John, the teacher, the principal, other learners, and Susan) indeed represent different stake-holders in schooling system. The *scene* is the school itself, with different sets like the classroom, the boys' bathroom, the principal's office and the school yard; spaces commonly found at schools.

Susan wrote:

John was the smallest in his class. Larger boys in the class teased him by holding stuff beyond his reach, tapping him on the head, and making remarks about his genitals in the bathroom. A boy once urinated on his foot.

The *acts* of bullying (teasing, laughing, urinating on his foot) are similar to what plays itself out in many schools (Jacobs & De Wet, 2014). John reported the incidences to the teacher as is recommended in anti-bullying programme (Polanin et al., 2012).

John told a teacher about this, but the response was that he should stop telling tales, stop being a "sissie" and learn to stand his ground.

Vahedi et al. (2016) emphasises the need for teachers to have comprehensive understanding of the phenomenon of bullying, and how to respond to incidents of bullying. Adults at school should be empathetic about incidences of bullying (Gutt & Randa, 2016), and teachers, by virtue of their profession should take care of all the children under their tuition (Botha et al., 2015). This teacher's reaction however, suggest a lack of understanding, indifference, or that she views bullying as normal.

He reacted to this by starting to tease other learners and playing tricks on them. He frequently got into trouble for this at school, and his school work deteriorated drastically.

The snowballing dynamics of negative reactions by the different actors strengthened the feeling of otherness in John, and left him powerless. The teacher seemingly joined the crowd on stage, taking sides against John, who consequently became a popular target:

Once, a teacher caught John chewing gum. Although a number of learners in the class were chewing gum, the teacher decided to make an example of John, by forcing him to rub the gum in his hair. The other learners laughed, but John was in tears.

The audience experienced this as a comedy, while in John's life, a tragedy unfolded. Susan, realised that her child was suffering, and contacted me for advice. I recommended that she should go to the principal, expecting the principal to act as a diligent *pater familias*, to give advice or to intervene towards a positive outcome for all learners. The principal however showed a lack of understanding of the dynamics of victimisation, and took a position that was both defensive (in terms of the responsibility of the school) and judgemental (in terms of John and Susan):

The principal was not really interested in what I had to say. She told me that John was, for instance, caught putting a frog into another child's sport shoes. The more I tried to explain that negative behaviour by others elicits this response in John, the less interested she was. The next day, the principal called all the grade 7 learners to assembly, told them to stop any bullying behaviour and to stop running to their parents with stories.

The principal could afterwards claim that she did take steps to address the problem by warning the learners not to engage in such acts. Yet she countered this by the message that they should not tell their parents about it.

This closing scene was, for both John and Susan, disheartening.

John became more and more subdued. His school work continued to deteriorate. He did not want to go to school or to any activity at the school. One day, he saw children tripping and roughing up his little brother. He lost his temper, and viciously attacked the children, using a knuckle duster. He was put in detention until the end of the year, and was barred from taking part in extramural school activities.

Discussion

If asked, the children who targeted John would most probably claim they were just having fun, or that most of the acts were accidental. The teacher would undoubtedly explain that the children were warned numerous times not to chew gum, and that she herself did not rub the chewing gum into John's hair. Treating John with contempt could even earn her some popularity amongst those who were targeting John.

While Salmivalli (2010) suggests that children who engage in bullying behaviour seek power and status amongst their peers, Chaux and Castellanos (2015) argue that gaining popularity gives individuals the power to bully others. The various actors would point out that John is indeed the problem in all of this and that carrying a knuckle duster to school proves intent. The mother would be sketched as interfering with the running of the school and being overprotective. Yet, Belmore (2016) highlights that it is important for parents to be aware of what is happening in their children's lives and should play a significant role in intervening when necessary.

John clearly struggled to fit in, and his motive for pranking and teasing the others was most probably a combination of trying to blend in while also revenging himself.

Reflecting on the interplay between *scene* and *act* as well as *scene* and *actors*, the context of this school seemingly allowed people to act in socially unacceptable ways. When the teacher did not acknowledge that it is offensive to urinate on somebody else's foot, or even worse, forced John to rub chewing gum into his own hair, it set the scene for more undesirable behaviour.

Furthermore, when actions like these are condoned, but other pranks (like a frog in a shoe) are condemned, inconsistencies come to the fore, and the message is clearly interpreted by John (and also the other learners) that he stands alone against the rest of the school (both staff members and peers). In this drama he is casted as the antagonist who should be excluded. This resonates with Heinemann notion of mobbing: "something that is done by the group to someone who does not fit in" (Horton, 2016, p. 210).

Changing the script

A myriad of recommendations addressing bullying exists, and in the context of the study, addressing the scene-actor dynamics is essential. Scholarly literature suggests that in schools where there are structure and support, and a deep understanding of the phenomenon of bullying, less victimisation occurs (Vahedi et al., 2016). Children need to be taught to be kind and considerate towards each other. Parents and teachers need to adopt autonomy-supported approaches when educating children. Roth, Kanat-Maymon and Bibi (2011, p. 655) explain that “autonomy-supportive contexts involve acknowledgement of the child’s feelings, taking the child’s perspective, providing rationale, allowing choice, and minimizing pressure”.

Conclusion

Burke indeed provides us with a framework to critically look at the scripts of the bullying dramas as they unfold. Bullying is intentional and repetitive harm to a targeted person and that can only happen if the context allows it. While some learners are popular, others are not. Teachers and school managers need to be knowledgeable about bullying but they also have to nurture a different mind-set about the problem unlike the players in the drama discussed in this case study. A better understanding of how a scene is set up to either include or exclude, the nature of the dynamics among the lead actors, not casting them as protagonists and antagonists, and a varied script for actors in supporting roles, can indeed lead to a more positive final scene.

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Dr. Lynette Jacobs, University of the Free State, South Africa, JacobsL@ufs.ac.za

Juliana Smith & Rosalie Small

Is It Necessary to Articulate a Research Methodology When Reporting on Theoretical Research?

Abstract

In this paper the authors share their insights on whether it is necessary to articulate a research methodology when reporting on theoretical research. Initially the authors, one being a supervisor and the other, a PhD student and a colleague, were confronted with the question during supervision and writing of a thesis on theoretical research. Reflection on the external examiners' reports about whether a research methodology for theoretical research is necessary prompted the writing of this paper. In order to answer the question, the characteristics of theoretical research are clarified and contrasting views regarding the necessity or not of including a research methodology section in such a thesis, are examined. The paper also highlights the justification for including a research methodology in a thesis that reports on theoretical research, investigates the soundness of such justification and finally draws conclusions on the matter.

Keywords: PhD thesis, external examination, research methodology, theoretical research, philosophical and analytical research, critique of educational questions

Introduction

The purpose of this article is to address the question: Is it necessary to articulate a research methodology when reporting on theoretical research?

Before we attempt to answer this question it is necessary to discuss the distinction between research methodology and research methods as these two terms are used in the paper. These two terms are usually used interchangeably in the literature; however there are conceptual differences between them. Research methodology encompasses a broader conception of the process of the research process whereas research methods, in a narrow sense, refers to the research instruments. Some scholars confuse research methods (e.g. data collection methods such as interviews, questionnaires or focus groups) with research methodology (e.g. phenomenology, ethnography, critical theory, grounded theory, etc.). According to Birks and Mills (2011, p. 4), the research methodology describes the philosophical framing of the study and 'is a set of principles and ideas that inform the design of a research study' and the research method as the practical procedures used to gather and analyse data, while admitting to a considerable amount of interplay between the research methodology and the research method.

The above question emerged during the writing process of a thesis that reports on theoretical research, and resurfaced again when we reflected on examiners' comments on a relatively recently examined PhD thesis (Small, 2012), entitled "Conversations about values in education in South Africa 2000-2005: A theoretical investigation". The candidate explained that her conceptual investigation was located within a qualitative research paradigm, following an interpretive meta-

theoretical approach. She identified her research design as ‘philosophy as social practice’, and her research method as philosophical investigation. She undertook an investigation into the constitutive grammar of these conversations about values in education. She argued that the Department of Education (DoE) initiated conversations about values in education and engaged in a less than rigorous manner with concepts, which she suggested, results in conceptual confusion or lack of conceptual clarity.

The question was fore fronted by contrasting comments in this regard on the part of examiners of the thesis. One examiner declared unequivocally that it is unnecessary to articulate a research methodology (hereafter referred to as research methods) in a research methodology chapter for a thesis that reports on theoretical research:

I don't think a thesis such as this needs a methodology chapter such as what the candidate provides in chapter three. This is a philosophical/conceptual analysis based on the internal logic of a set of arguments, which, in our instrumentalist times is sorely lacking: there's no need for a separate chapter to justify its research methodological choices.

A second examiner appeared to be appreciative of the articulation of a research methodology and stated:

In an innovative creative manner, well within the legitimate boundaries of philosophical, analytical research within the qualitative research approach she has explained her methodology and adhered to rigorous theoretical argumentation and logical coherence. She demonstrated that she could design a suitable research plan which will produce the kind of analysis that fulfilled the aims of the research... The application of the research methodology, namely philosophy as social practice is viewed as a new realm for research in policy analysis.

In our attempt to address the question as articulated in the outset of this paper, firstly, we look at the type of thesis that reports on what we characterise as “theoretical research”. In the process we clarify what is to be understood by “theoretical research”. Next, we examine contrasting views regarding the necessity or not of including a methods section in such a thesis. Then, we examine the justification presented in a thesis that reports on theoretical research, for including a methods section, and briefly investigate the soundness of such justification. Finally, we draw conclusions regarding the necessity for including a methods section on a thesis that reports on theoretical research.

The type of thesis that reports on theoretical research

The thesis under consideration which reports on theoretical research does not include a separate chapter on a review of the relevant literature in the fields and the development of a conceptual and/or theoretical framework. The reason for this can be explained with reference to work of Paltridge (2002, pp. 125-143) who focuses on four general thesis formats. Three of these thesis formats are of relevance here. Firstly, there is the ‘simple’ traditional thesis that Paltridge identifies as follows (2002, p. 131):

A study with a ‘simple’ traditional pattern is one which reports on a single study and has a typical macro-structure of ‘introduction’, ‘review of the literature’, ‘materials and methods’, ‘results’, ‘discussion’ and ‘conclusion’.

This thesis format translates into a well-known single study which is presented, with minor variations in what Boote and Beile (2005, p. 10) refer to as “the traditional five-chapter empirical dissertation”. This type of thesis usually has the following chapters: Background; Literature Review; Research Methodology; Presentation, Analysis and Discussion of Research Results; and Conclusions and Recommendations. The second thesis format that Paltridge (2002, pp. 131-132) focuses on is the ‘complex’ traditional format which consists of a number of related studies. This type of thesis would usually contain the following: ‘Introduction, Review of the Literature and Materials and Methods’ sections, as does the ‘simple’ traditional format. The remaining chapter would then report on each of the individual studies and conclude with a general and overall ‘Conclusions’ chapter.

A third dissertation format is the ‘topic based’ dissertation which, according to Paltridge and referenced by Boote and Beile (2005, p. 10), is “often used in education, especially for theoretical, philosophical, humanities-based, and qualitative dissertations”. Such a dissertation would not conform to the traditional simple dissertation format. Paltridge (2002, p. 132) identifies this type of dissertation as ‘topic-based’ thesis, which is characterised as follows:

This type of thesis typically commences with an introductory chapter which is then followed by a series of chapters which have titles based on sub-topics of the topic under investigation. The thesis then ends with a ‘conclusions’ chapter.

The thesis under discussion that reports on theoretical research conforms to the ‘topic-based’ format. It comprises a single study – values in education (Small, 2012) – its format therefore cannot be characterised as a ‘complex’ traditional format. Neither is its format a ‘simple’ traditional one since it does not have separate ‘Literature Review’ and ‘Presentation, Analysis and Discussion of Research Findings’ chapters. The two chapters are often infused in various chapters of the thesis or, as Boote and Beile (2005, p. 10) say, “interspersed throughout the dissertation”. The thesis under discussion was devoid of fieldwork, and is therefore characterised as ‘theoretical research’. The question that arose was whether it was necessary to include a methods section in a thesis reporting on theoretical research where no fieldwork was carried out. The next section presents the contrasting views regarding this question.

Contrasting views

As stated earlier, the undertaken research, which we characterise as theoretical research was entirely text-based and was devoid of fieldwork. There is a view that a thesis reporting on text-based research does not need a separate research methodology section or chapter and that an attempt to articulate a research methods section for text-based research is a futile exercise. In this regard Clingan (2008, p. 2) writes:

Textual or theoretical research does not require a methods section because it would be rather an ineffective process to write: “I read one hundred and three books, listened to six professionals in the field, read multitudes of current articles on the subject, thought about and weighed all of that, and came to the following theoretical conclusion”. That method... becomes obvious as the material is presented and therefore does not need to be described in a discrete methods section.

Clingan (2008) appears to imply that the methods employed by a researcher engaged in textual or theoretical research will reveal themselves in the reading of the completed text. However, we contend that Clingan's claim appears to be underpinned by a limited conception of 'methods'. In the extract below, Clingan (2008, p. 2) articulates what, according to her, 'research method' entails:

The methods section of a thesis, dissertation, or any research paper or article is the section that describes any and all specific steps and procedures that were taken to gather data. It tells the reader exactly how the research process was carried out. Methods describe in specific detail the actual steps carried out to give each reader (and evaluator) the following specific information: what exactly you did to gather your data, enough information to determine whether they see the process as objective and well-served, and the steps involved so that someone could essentially repeat the research if desired.

It is clear that Clingan (2008) associates a methods section very closely with data gathering and analysis in respect of research that involves fieldwork and that she works with an extremely narrow conception of 'methods', a conception Ruitenberg (2009, p. 316) refers to as a Baconian conception that equates 'method' with 'technique'. Bridges and Smith (2006, p. 133) also referred to Bacon's attempts during the 17th century to "formulate research methods for the social sciences that can be applied regardless of the acumen of the researcher". Clingan (2008) indeed equates 'method' with 'technique' when she refers to the requirement in the last line of the extract above from her paper that a good methods section makes it possible for the research to be repeated at a future date.

Apart from a limited conception of 'methods', Clingan's (2008) view has also positivist overtones if she implies that the same results will be obtained if the research can be replicated. This may happen, for example, in physics where experiments can be repeated and, provided the correct techniques are followed, the same results will be obtained. But this is patently not the case with qualitative research in education and in other social sciences. If a different researcher carries out the data gathering process, responses to the same questionnaires or interview questions may yield vastly different responses depending on a number of factors such as the context within which the research is carried out, the personality and manner of presentation of the researcher.

Ruitenberg (2009, p. 316) articulates a broader conception of 'methods' when she claims that:

Methods... refer to the various ways and modes in which philosophers of education think, read, write, speak and listen that make their work systematic, purposeful and responsive to past and present philosophical and educational concerns and conversations.

In other words, 'methods' refer to everything the researcher in philosophy of education carries out in the course of the research. In respect of the necessity for researchers engaged with theoretical research, Ruitenberg (2009, p. 316) argues as follows:

Education is commonly seen as a social science... with perspectives from the natural and social sciences as well as the humanities. One of the consequences is that the philosophers of education are expected to be able to answer questions about their methods just as their social science colleagues do.

Ruitenbergh (2009) appears to be bowing under pressure from outside the discipline of philosophy of education itself to articulate the methods used when engaging in theoretical research devoid of field work. The articulation of ‘methods’ is a stringent requirement when reporting on data gathering processes. The fact that philosophers of education are under pressure from outside to articulate a ‘methods’ section in their research reports does not present a sufficiently compelling reason for such articulation. However, Ruitenbergh (2009, p. 317), referring to the essays within the 2009 edition of the Journal of the Philosophy of the Education Society of Great Britain, which attempt to explain what philosophical methods were used for when the essays were written, observes that:

The essays in the current volume... provide articulations of particular modes of philosophical thinking, reading and writing that are of value for the elucidation or critique of educational questions.

Ruitenbergh (2009) claims that it is important to articulate one’s method of doing philosophy of education since such articulation contributes to the clarification or critique of educational questions.

A justification for including a methods section in a thesis that reports on theoretical research

The PhD research took place within a qualitative methodological paradigm. Concomitant with the qualitative methodological paradigm, the metatheoretical approach was an interpretive approach. The research attempted to interpret and understand the Department of Education’s conversations about values in education in South Africa. This was a theoretical study that did not rely on fieldwork for data gathering; therefore philosophy as practice was identified as research design.

The assumptions that underlie the view that philosophical investigation is a valid research method are the following. Philosophy must not be regarded simply as a worldview, which is what people might have in mind when they refer to their “philosophy of life”. Philosophy must be viewed as an activity. One does philosophy; you do not have philosophy. The distinction here is one that sees the word ‘philosophy’ as a verb, and not as a noun.

A social practice may be understood as “any coherent and complex form of socially established cooperative human activity”, according to MacIntyre (1984) quoted by Sheffield (2004, p. 761). This places an emphasis on philosophy as activity. Within this conception of philosophy as practice we identified philosophical investigation as a research method. Philosophy as a research method comprises “an analysis, clarification and criticism of the language, concepts and logic” (Sheffield, 2004, p. 763) of DoE conversations about values in education. This enabled us to uncover assumptions about education and schooling underlying DoE conversations about values, establish the extent of continuity amongst DoE conversations, establish the extent of conceptual clarity of DoE conversations and uncover meanings assigned to value concepts.

Sheffield (2004) presents an argument for viewing philosophy as an important qualitative research method. Sheffield (2004, p. 761) addresses two questions: What exactly are philosophy’s methodological tools and subject matter? Why should philosophical work be understood, at least in part, as a viable research method?

The structure of Sheffield's (2004) argument is based on the following trail. He begins with the claim that philosophy must be viewed as social practice. On the basis of his argument to support this claim he concludes with a "working definition" of philosophic method. It is in terms of this "working definition" that Sheffield (2004) explicates what he calls the "tools" of philosophy, as well as the subject matter of philosophy. The "working definition" finally provides Sheffield (2004) with a way to argue for the relevance of philosophy.

In the next paragraphs we outline Sheffield's (2004) argument. If philosophy was to be shown to be a valid research method, the next question, then, is what are the "tools" of philosophy?

In order to address this question, Sheffield (2004, p. 762) draws on unpublished work of Sherman who provides him with a "working definition" of philosophic method as "the analysis, clarification, and criticism of the language, concepts, and logic of the ends and means of human experience". The conceptual and qualitative nature of philosophic method emerges through this "working definition".

Sheffield (2004, p. 763) points out that the terms analyse, clarify and criticise indicate the tools of philosophic method. The following extract shows the close relationship between analysis and clarification, and then singles out conceptual clarification as one of the responsibilities of philosophers (Sheffield, 2004, p. 763):

In analysis, one reduces complex ideas or explicates human situations into understandable, relational concepts. Through analysis essential concepts that drive practice are extracted... so that they may be more easily understood and debated. Closely related to analysis is clarification... Philosophers have... to challenge and ultimately clarify those constructs we use to make sense of the world; constructs often taken for granted.

Analysis and clarification are accompanied by criticism, which can be viewed as the third task of a philosopher. Sheffield (2004, p. 763) is explicit about the relationship between criticism and value judgment:

Criticism means making judgments as to value. Philosophers judge the instrumental/practical value of those concepts... for driving practices and in that critical, interpretive mode build new and better conceptual understandings... it is also clear that in "extracting" conceptual constructs that drive actual practice (rather than from some imagined practice), philosophy is a very qualitative, experiential method.

The "working definition" also answers the question as to what the philosopher's objects of inquiry are. These are language, concepts and logic. Finally, Sheffield (2004) argues for the relevance of philosophy as a research method. The "working definition" refers to "the ends and means of human experience", and Sheffield (2004) refers to the philosopher as philosopher-as-social practitioner. Based on this view of a philosopher Sheffield articulates the relevance of philosophy as social practice alongside other social practices (2004, p. 763):

Philosophy attempts to make clear the way we think about human experience so that reasonable action (means) might evolve which can lead us to just and socially established goals (ends) within the human experience... Philosophers investigate real problems that might be alleviated through further conceptual understanding. It is, in this regard, a social practice that is very qualitative in nature and one, as a social practice, on par with other, more widely accepted, research practices.

The research of Small (2012) constitutes a theoretical investigation of DoE conversations about values in education, it attempts an analysis, clarification and criticism of the language, concepts and logic of DoE conversations about values in education. Specifically, it investigates DoE arguments for claims made in the relevant conversations in respect to values in education, and it clarifies assumptions underpinning these arguments.

Concluding remarks

There is indeed institutional pressure on researchers engaged with research that does not involve fieldwork to articulate a research methodology. However, if the articulation of a research methodology can assist in clarifying or critiquing educational problems then this would constitute sufficiently compelling reasons for including a methodology section or chapter in a thesis or dissertation reporting on theoretical research. Because of this latter reason, and also because of institutional pressure as a result of a non-negotiable requirement to include such a chapter, the thesis in question included a 'research methodology' chapter. However, the articulation of a research methodology chapter in the traditional sense is not necessary when reporting on theoretical research.

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Prof. Dr. Juliana Smith, University of the Western Cape, South Africa,
juliana@worldonline.co.za; jmsmith@uwc.ac.za

Dr. Rosalie Small, University of the Western Cape, South Africa, retired,
small.rs.rosaliejoan8@gmail.com

Anna Czyż

Early Support Development of Children with Disorders of the Biopsychosocial Functioning in Poland

Abstract

This article presents the results of a research study on the system of early child development support with developmental disabilities and their families in Poland. The analysis covered areas such as proximity and accessibility of services, infrastructural conditions, preparation of personnel, and occurrence of systemic barriers. The article provides a verification of the model of early intervention teams working in the field of diagnosis, design and implementation of impact, the responsibility for the course of therapeutic work and team development. In addition, the role of parents in therapy as well as the strengths and weaknesses of the system are discussed.

Keywords: special needs, early support development, system of early intervention

Introduction

The functioning of persons with developmental difficulties is particularly dependent on the efficiency of the system of support, care and rehabilitation. Early detection, diagnosis and taking impact depends on the quality of life of entities. An implication for the efficiency and effectiveness of revalidation interactions is the socio-economic situation of both, disabled people themselves and the state care over individuals that are socially dependent on a third person or an aid system.

The rapid development of the system of early intervention in Poland, as a whole psycho therapeutic interaction, initiated in case of detection of dysfunction, is dated in 1960s. The diagnosis counseling and rehabilitation for people suffering from various disabilities were formed at the time (Czyż, 2009). Over the years, the idea of early intervention has evolved, although basically the meaning of the concept has not changed. It changed the target group of recipients and oriented the focus on families with children, which in any respect require the support of development, from the moment a problem is detected to take the school. In Poland, at the beginning of the twenty-first century started working on the organization of the early support development system of children and their families. The regulations have been created, and over the years increasing number of teams was established to support early development. Those teams were including help with the increasing number of children, acting alone or with other educational-therapeutic institutions. According to the Education Information System, in 2008, by early assistance 14,021 children and their families were covered, in 2013 their number increased to 25592, and 2014 amounted to 29450 and continues to grow. Currently, work of early support teams regulates the basic implementation act to the Law on the System of Education of 1991, which is the *Regulation of the Minister of National Education of 11 October 2013 on the organization of early support for children's development*

and a number of other regulations also important for the functioning of the legislative system. The teams operate in all provinces and in terms of the early development support (not counting the training institutions for early development support teams such as: psychologists, speech therapists, surdo-, tyflo-, oligofreno- or nozoeducators, physiotherapists and others) therapists can gain knowledge in 62 universities.

Support of the child and family

All institutions involved in supporting child development and surrounding parental care are aimed at maintaining or restoring the proper functioning of families in the environment and their activation in the society together with the performance of the respective social roles. Wojciechowski (1998) notes that when considering issues related to support of children and families in specialist centers – psycho, medical, social and other educational or legal clinics understood as institutional – of formal support units, equally important is the informal support, which is the core idea of striving for the proper functioning of the system. This support applies to immediate family, social groups, professional groups, peers, and other groups with relatively strong emotional ties and considerable degree of intimacy between individuals. Initiatives take people to use their own life experiences and knowledge. Informal support is also the effect of foundations and associations activities, especially all institutions which provide services and resources used for therapy purposes. In conjunction with a professional, deliberately organized early assistance, where a support function is to act fully by professional with appropriate education code, holding the baggage of experience and usually equally large workshop methodology it creates a system which effectiveness depends on all the relevant elements.

The early development support is placing particular emphasis on the participation of parents in therapy. Parents not only have knowledge of child development problems, but above all actively strive to overcome difficulties in order to improve the quality of life for the whole family. Child development, particularly affected by disability, is guided not only by therapeutic institutions. Guidance also comes from other entities that contributed to support as informational, spiritual or material, but above all by turning the family environment and the immediate environment of the child to revalidation. Making decisions together, defining and implementing rehabilitation programs contribute significantly to the development of a child and determine the effectiveness of therapeutic interventions. As Wojciechowski (1998) noted, involving families in the rehabilitation process of a small child also helps to accept the disability and prevent parents from addiction to aid institutions. Enabling caregivers working with children is not easy because many of them, manifest hostility and lack of acceptance when exposed to aspects of disability. Therapists are faced with the problem of caretakers' shock associated with the occurrence of difficulties related to the diagnosis of disability. Kosmalowa (2004) proposes to introduce widespread use of the terms "family-centered therapy – family therapy" and not only therapy of the child.

As per European report on Early Childhood Intervention (2005), the early development support, except for the inclusion of family into therapy, should be

primarily available and should not require long waiting-time to undertake therapeutic work. Action should be taken:

- immediately as required support;
- close – benefits are to be carried out in the family home or institution close to home;
- adequately funded – draws attention to the system, which provides support to all in need, regardless of the financial condition of the family – the wealth;
- acting at least under an interdisciplinary model – where teams work together on establishing a diagnosis support program, consult its implementation and make changes adequately to the needs. The role of a parent in therapy is taken into the account. They are co-responsible for the development of the supported individuals and also take care of the development of its own, as a guarantee of effectiveness, following modern trends interactions and providing adequate support to the needs of entities.

In addition, the importance of multifaceted and multi-institutional cooperation is underlined for the benefit of persons covered by the support and the role in supporting the development of barriers and their removal, including those related to legal regulations, policy, infrastructure and geography, economics and financing and implications stemming from the business world (Gallagher & Clifford, 2000).

Study of the system of early development support in Poland

Method and material

Research on the functioning of the system of early development intervention in Poland was placed in the paradigm of pragmatic, quantitative strategies, using interviews and diagnostic survey (Creswell, 2013). The survey was designed to determine the availability of early development support services, infrastructure, preparation of personnel to conduct classes and the barriers to the implementation of activities. Research concentrated on prevailing model of early support development in Poland based on the guidelines for the model of multidisciplinary, interdisciplinary and transdisciplinary with regard to the role of the parent in the team (Twardowski, 2012), diagnosis of the strengths and weaknesses of early development intervention system and identification of areas to improve the quality of its operation. The study was conducted mainly in the southern parts of Poland between November and December 2016.

Characteristics of the study

The study involved 44 institutions in the following provinces: Malopolska, Slaskie, Podkarpackie, with subsidiaries in the Mazowieckie, Pomorskie and Lower Silesia. Information on teams work granted 47 people, including 20 directors and deputy directors, 4 coordinators and team members, including teachers, speech therapists, psychologists and early development intervention therapists. The vast majority of institutions operated in public sector (public institutions, private, local/municipal), providing services in the area where the headquarters are located, and surrounding areas. Seven institutions were located in other places – branches of early development intervention teams (10 institutions were located outside headquarters). Due to the previously mentioned period of data collection, teams

were divided into three groups: very young teams – the period of activity under 3 years ($N = 5$), the teams operating from 3 to 7 years ($N = 18$), the teams operating over 7 years ($N = 21$). Six institutions operated as a separate entity providing only the services for early development support, other work at kindergartens, schools and school teams (including the special facilities), psycho-pedagogical centers. Eight teams used the separated rooms, the rest used infrastructure facility at work. All parties benefited from the educational subsidies (financed by the county, town, municipality), five also drew financial benefits from commercial activities, and ten were financed also by the founders, donors, sponsors, benefited from sources with projects, grants and competitions and funds transferred to the Public Benefit Organization.

The early development intervention teams differed in terms of the amount of the personnel and the number of supported children. Due to these two variables following units can be divided into: very small ($N \leq 10$), small ($11 < N < 19$), medium ($50 > N > 20$) and high ($N > 50$). Due to the number of staff very small was 17, small – 13, medium – 10, high – 4. Due to the number of children covered by the early-assistance very small was 4, small – 5, medium – 17, high – 18.

Interpretation of test results

Availability of services

Operating hours of participating in research facilities allow free access of supported families to the services. Seven teams have not set rigid time frame, all work flexibly adapts to the needs of pupils, one facility provides stationery services only in the morning, 4 institutions only in the afternoon. All facilities indicated the willingness to change the hours as needed supported entities. The remaining 37 teams are available for early morning hours (most from 8.00 a.m., but 7 teams working well within the range 6.00 a.m. till 8.00 a.m.) and for late afternoon. Where necessary, the time availability can be changed and adapted to the possibility of entities covered by the aid (three institutions are closed earlier than 17.00 p.m., other in the time interval 17.00 p.m. till 20.00 p.m.). The teams work 5 ($N = 38$), 6 ($N = 5$) or 7 ($N = 1$) days a week.

Families are accepted into the care of the teams in accordance with Regulation of the Minister of National Education of 11 October 2013 on the organization of early support of children with its opinion about the need for early development support. The waiting time for acceptance is different depending on the institution. Taking into account waiting for acceptance in the institution was up to date for 18 institutions, 2 weeks for 5 institutions, one month for 11 institutions, above one month for 6 institutions, when releasing a place for 3 institutions, no admissions for 1 institution.

However, in most institutions the waiting period does not exceed one month. It can therefore be concluded that the waiting time for acceptance does not affect child's development, but a separate issue is jurisdiction: the need for early intervention is stated by a panel, where the impeding interventions can be found in the form of bureaucracy, the waiting period to collect the composition of the case-law.

Infrastructure

Workplace of the early development intervention teams is easily accessible and well-connected. Infrastructure understood as housing conditions designed to the needs of young children with various disabilities, special aids and appliances can be assessed as unsatisfactory. Thirty-eight teams in the 44 tested did not own premises. They benefited from dedicated rooms at educational institutions or used the same premises in which the activities were conducted in accordance with the institution specialization. The narrowness problem concerned as well the teams placed in independent buildings, due to the growing number of clients. Architectural barriers were frequently reported as problematic. No ramps, elevators, or parking have a real effect on the ability to participate in activities. Teams' facilities in terms of therapeutic tools depended largely on the institution at which they work. Very wide variation was noticed here – from teams that have advanced, modern equipment and aids to the teams that have only aids such as blocks, books and puzzles. The richest assistance base had teams operating at the special and private centers. The weakest one had small teams, working on the side of other educational institutions. The best-equipped teams could use following equipment:

- the world's experience room,
- rooms with a specialist rehabilitation appliances,
- modern technical aids to teach the Tomatis method or Johansen training,
- equipment for biofeedback,
- aids to conduct sensory integration and arm therapy,
- own horse farms to conduct hippotherapy.

Each institution had adapted room for speech therapy and psychological consultation. Facility had space for small children care as well. Representatives of the surveyed groups pointed the large number of diagnostic and teaching equipment including computers and multimedia. Very large differences in equipment level of the researched teams lead to the conclusion that it is necessary to pay special attention to equipping facilities, which indicates insufficient quantity and quality of assistance to carry out effective activities using modern technological achievements.

Human capital

A strength of the early development intervention teams is highly qualified personnel. Therapists' qualifications, however, are not offset by employment stability. The main reasons for this connect to law regulations on the functioning of the early development intervention teams and financing their activities in the therapeutic work. An additional problem in the employment of the members is the lack of clarity in supervision over early assistance in Poland, which, among others, implies dilemmas regarding therapist working time. Only 5 facilities of early development intervention team members were employed on post ranging from 18 to 35 h/week. In the remaining institutions jobs were combined with contracts for work or commission. Therapists worked only in the framework of contracts or so-called overtime being employed by the educational institutions at which the teams work. Volunteering was also an option.

Team members were prepared in the field of early development support. Where appropriate, the team included speech therapists, special educators, psychologists,

physiotherapists and people specialized in the work of a specific method (e.g. SI therapists, Tomatis hand), dieticians and occupational therapists. Among the team members there was no social worker. The identified problem was lack of cooperation with doctors and nurses who do not get involved in the work teams, but often hinder work by not providing relevant information, which is crucial for getting early support. Despite the confusion and lack of employment (as it seems), the teams presented a compact and stable structure able to work together for the entities support. The interviewed teams indicated that they are proud of the skilled, talented and hard-working therapists who provide support and satisfaction for entities that acquire care. In addition, it was also noted the fruitful cooperation within the team, versatility and diversity of the impacts and continuous therapists improvement to provide quality services.

Barriers

Representatives of the early development intervention teams identified factors inhibiting and limiting therapeutic work. The most frequently declared factors included the regulations related to financing activities and the number of hours per unit covered by the support. Dilemmas of teams' work turn out to be also the case-law system, including inaccuracies concerning the judgments of the disability. The problem seemed to be a system for issuing opinions, regulations for the selection of facilities and conditions of employment for therapists/teachers in teams and intensifying problems of bureaucracy. For extralegal, most often articulated dilemmas included: cooperation with the family and the community, too many pupils per one therapist, staff shortages, and cooperation with other institutions having real impact on diagnosis and therapy, organizational problems as a result of hiring practices of early development intervention therapists.

Results and a summary of research

Research on the functioning of the early development support teams provides information for identifying the strengths and weaknesses of their activities. Undoubtedly, important and positive aspects are flexibility and availability forms of support, short waiting period for acceptance and commitment of therapists to create most favorable support environment targeted to work with the family and child in need of therapy. Adverse circumstances are associated with:

- poorly functioning legal system creating restrictions on jurisprudence,
- hours and forms of support,
- practices of hiring employees,
- poor financing system, not retrofitting institutions aids to conduct therapy,
- poor infrastructure including lack of space.

However, teams present a very high level of determination; despite the drastic limitations, entities care system of early support is considered more seriously. Team members care about the development of children and assistance of their families. In order to maximize the benefits specialists need a broad knowledge and modern methods of therapy. Therefore, they are willing to participate in training courses and studies where they have potential to acquire the necessary knowledge and skills. The team members are full of energy, commitment, competent staff covering entities by care and support. The prevailing model (considering the issue globally) appears to

be multi and interdisciplinary. Team members devote too little attention to collaborations, parents are often treated as consultants rather than team members. A parent in the above mentioned relationship assumes the role of a contractor responsible for the task and consent to operate, but having no real impact on the formation of the therapy program. Cooperation within the team reminds a specialist consulting rather than a joint establishment and implementation of the program – it can be observed in task implementation and responsibilities for the diagnosis and support process. The selection of members is legally regulated and it is not conducive to the process of creating relationships within the team, the conjunction and partnership. Another very important issue which forms the basis for corrective action is cooperation with partners from outside. Main dilemma lies in the lack of medical entities such as doctors, nurses, and social workers in early development support teams. Their participation would provide a lot of relevant information on the health status and treatment options. Social workers caring for families would be an indispensable source of information on the child's environment growth, but above all for the wider care of the family in its natural setting. Poor cooperation with the environment and international financial institutions, limiting the support offered in the range of the early intervention of the development is concerning as well.

Conclusion

Summing up the study of the early development intervention system it is noticed that the tilt of action is moved towards human labor and not a systemic support or initiatives from above. At the moment, systemic support significantly interferes with the construction and functioning of early development intervention teams. In the complicated conditions of therapeutic success team members should pay particular attention to the role of parents. Psychology in fact emphasizes the relation asymmetry between therapist and the subject of the therapy. Although relationship in itself is already kind of therapy, it cannot be expected from a person sometimes emotionally not ready to take action, to be a full-fledged member of the team. It should also be noted that in many cases taking actions to the development of a child is exhausting for a parent. With respect for parent knowledge and skills, understanding importance of its support for the success of the therapy, an action model should be adjusted according to individual family. Parents should be active in providing support, but with particular emphasis on the psycho-physical capabilities. The specific activities of repair also requires a system of cooperation not only with the other institutions but also with the local community and business.

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Legislations

- Rozporządzenie Ministra Edukacji Narodowej z dnia 1 lutego 2013 r. w sprawie szczegółowych zasad działania publicznych poradni psychologiczno-pedagogicznych, w tym publicznych poradni specjalistycznych.
- Rozporządzenie Ministra Edukacji Narodowej z dnia 11 października 2013 r. w sprawie organizowania wczesnego wspomaganie rozwoju dzieci.
- Rozporządzenie Ministra Edukacji Narodowej z dnia 18 września 2008 r. w sprawie orzeczeń i opinii wydawanych przez zespoły orzekające działające w publicznych poradniach psychologiczno-pedagogicznych.
- Rozporządzenie Ministra Edukacji Narodowej z dnia 23 kwietnia 2013 r. w sprawie warunków i sposobu organizowania zajęć rewalidacyjno-wychowawczych dla dzieci i młodzieży z upośledzeniem umysłowym w stopniu głębokim.
- Rozporządzenie Ministra Edukacji Narodowej z dnia 6 listopada 2013 r. w sprawie świadczeń gwarantowanych z zakresu rehabilitacji leczniczej.
- Ustawa z dnia 12 marca 2004 r. o pomocy społecznej (z późniejszymi zmianami).
- Ustawa z dnia 7 września 1991 r. o systemie oświaty (z późniejszymi zmianami).

Dr. Anna Czyż, Pedagogical University of Cracow, Poland, annaczyz@up.krakow.pl,
tobson@interia.pl

Part 7

Educational Development Strategies in Different Countries and Regions of the World: National, Regional and Global Levels

Oksana Chigisheva, Anna Bondarenko & Elena Soltovets

Analytical Overview of the European and Russian Qualifications Frameworks with a Focus on Doctoral Degree Level

Abstract

The paper provides analytical insights into highly acute issues concerning preparation and adoption of Qualifications Frameworks being an adequate response to the growing interactions at the global labor market and flourishing of knowledge economy. Special attention is paid to the analyses of transnational Meta Qualifications Frameworks (A Framework for Qualifications of the European Higher Education Area, The European Qualifications Framework for Lifelong Learning and Towards a European Framework for Research Careers) and the UK National Qualifications Framework, separately for each of its constituent parts, as well as Russia. Doctoral Degree level is chosen as a core for the analytical overview as the authors believe that this qualification level deserves much attention and continuous improvement to provide highly qualified personnel for the sphere of science and education in the nearest future. Critical remarks on the real impacts of such Qualifications Frameworks policy from the international perspective are represented.

Keywords: Qualifications Framework, Europe, Russia, the UK, globalization, quality of education

Introduction

Modern global economy is in continuous search of sustainable incentives for its structural and technological growth due to the increased development of high-tech industries, introduction of new generation technologies and breakthrough fundamental research in a number of scientific fields. The global format of the problem implies its solution at the global level, not only through international business interaction, free exchange of information and technologies, creation of international production chains and strong effective partnerships, but also through perspective vision of the necessary changes. It is obvious that the economies and companies that will form these promising changes will be able to transform the old

and create new sustainably developing markets in the nearest future, and also to identify their leadership positions at them.

In this regard, a special emphasis should be made by all the countries of the world on the formation of high-quality human resources – the leading experts in their fields who will create innovations and introduce breakthrough technologies. It is obvious, that only due to the qualified and competent personnel of the highest qualification it is possible to provide both global and regional economies with explosive growth and sustainable functioning in the future.

Development of creative and knowledge economy presupposes a highly educated human capital, therefore education becomes a key element in this chain, it must keep pace with the times, be competitive and connected with production. Only leaders in education will be able to prepare leaders for the economy, so only close interaction of these two areas will allow restructuring the sphere of education as a social institution, focusing it on the production of innovations and formation of powerful scientific and intellectual potential.

Thus, addressing the issues related to the analysis of modern Qualifications Frameworks with a particular focus on Doctoral Degree level in the international format is strategically justified and prioritized for identifying key steps for sustainable growth and development of the world's countries in the future.

Key facts on Qualifications Frameworks development

First-generation 5 Qualifications Frameworks were developed and implemented in the mid-1990-s, the next 10 appeared in the mid-2000s. In 2012 already 138 countries, including 27 EU countries, were planning, developing or implementing Qualifications Frameworks at the national level (Raffe, 2013). In 2013 more than 20 countries declared of their readiness to join the process and by 2015 “the United Nations listed 193 sovereign states, so NQF coverage extended to approximately three in four countries” (Global Inventory of Regional and National Qualifications Frameworks, 2015, p. 6).

Overview of transnational Meta Qualifications Frameworks with a focus on Doctoral Degree level

A Framework for Qualifications of the European Higher Education Area

A Framework for Qualifications of the European Higher Education Area was adopted at the Conference of European Ministers Responsible for Higher Education in Bergen, May 19-20, 2005. “We adopt the overarching framework for qualifications in the EHEA, comprising three cycles (including, within national contexts, the possibility of intermediate qualifications), generic descriptors for each cycle based on learning outcomes and competences, and credit ranges in the first and second cycles” (The European Higher Education Area – Achieving the Goals, 2005). This framework introduces the outcomes and credit ranges in the first and second cycles as descriptors.

“Qualifications that signify completion of the third cycle are awarded to students who:

- have demonstrated a systematic understanding of a field of study and mastery of the skills and methods of research associated with that field;
- have demonstrated the ability to conceive, design, implement and adapt a substantial process of research with scholarly integrity;
- have made a contribution through original research that extends the frontier of knowledge by developing a substantial body of work, some of which merits national or international refereed publication;
- are capable of critical analysis, evaluation and synthesis of new and complex ideas;
- can communicate with their peers, the larger scholarly community and with society in general about their areas of expertise;
- can be expected to be able to promote, within academic and professional contexts, technological, social or cultural advancement in a knowledge based society” (A Framework for Qualifications of the European Higher Education Area, 2005).

Thus, it may be stated that these qualifications descriptors make significant stress on the following elements:

- knowledge and understanding and their application;
- making judgments;
- communications skills;
- learning skills.

The European Qualifications Framework for Lifelong Learning EQF-LLL

The European Qualifications Framework for Lifelong Learning EQF-LLL was adopted April 23, 2008 by the European Parliament and Council. It is considered as meta framework, it is the basic document for the development of National Qualifications Frameworks. It consists of 8 levels. As descriptors stand theoretical and/or factual knowledge, cognitive (involving the use of logical, intuitive and creative thinking) and practical (involving manual dexterity and the use of methods, materials, tools and instruments) skills, competences in terms of responsibility and autonomy.

It should be noted that the descriptors for the third cycle in the Framework for Qualifications of the European Higher Education Area agreed by the ministers responsible for higher education at their meeting in Bergen in May 2005 in the framework of the Bologna Process correspond to the learning outcomes for EQF level 8. The content for level 8 includes:

1. knowledge at the most advanced frontier of a field of work or study and at the interface between fields;
2. the most advanced and specialized skills and techniques, including synthesis and evaluation, required to solve critical problems in research and/or innovation and to extend and redefine existing knowledge or professional practice;
3. competence to demonstrate substantial authority, innovation, autonomy, scholarly and professional integrity and sustained commitment to the development of new ideas or processes at the forefront of work or study contexts including research (The European Qualifications Framework for Lifelong Learning, 2008).

European Framework for Research Careers

The document ‘Towards a European Framework for Research Careers’ issued by the European research network for innovation in 2011 may be seen as a preliminary guidance for the researchers whose work should strengthen European science and technology, promote free circulation of knowledge and technological advances thus, making them more competitive in contemporary world (Chigisheva, 2015). The offered draft distinctly defines career paths researchers may have working internationally irrespective of their age, nationality and country of residence. The offered Career Framework provides comparability in research career structures, lessens researcher’s labor market fragmentation on the national criteria, diminishes segregation tendencies between career in industry, academia and other sectors, stimulates mobility and cross-border research cooperation.

In accordance with this understanding the following stages of researcher’s career development are offered: R1 – First Stage Researcher (up to the point of PhD); R2 – Recognised Researcher (PhD holders or equivalent who are not yet fully independent); R3 – Established Researcher (researchers who have developed a level of independence); R4 – Leading Researcher (researchers leading their research area or field) (Towards a European Framework of Research Careers, 2011). The document demonstrates the profiles and necessary and desirable competences for each of them. It is important that such progressive career paths do not necessarily require transition from one stage to another and it means that the researcher may feel comfortably within one chosen stage during his/her lifespan. However it is not a desirable variant as this framework demonstrates research prospects and possible research career advantages worldwide.

Overview of the UK and Russian National Qualifications Frameworks with a focus on Doctoral Degree level

The UK National Qualifications Framework

The UK National Qualifications Framework is represented by *The Scottish Credit and Qualifications Framework (SCQF)*, *The National Qualifications Framework for England, Wales and Northern Ireland (QCF)*, *The Credit and Qualifications Framework for Wales (CQFW)*. Final versions of the frameworks were published in March 2010 in the “Report Referencing the Qualifications Frameworks of the United Kingdom to the European Qualifications Framework”.

The Scottish Credit and Qualifications Framework was developed by the Scottish Credit and Qualifications Framework Partnership. It consists of 12 levels with the following descriptors identified: knowledge and understanding, practice, generic cognitive skills, communication, ICT and numeracy skills, autonomy, accountability and working with others. Level 12 corresponds to the Professional Development Awards and Doctoral Degrees and seriously correlates with the European Framework for Research Careers (2011).

It seems really important that at this level much attention is paid to the organization and research design skills. Thus, the professional should demonstrate critical understanding of research methodology and interdisciplinary knowledge leading to the production of new original and creative knowledge and significant

contributions to the research field. Practical application of concrete research outcomes is seen as a dominant characteristic of research activities; ability to research complex issues in uncertain conditions is prioritized. Thus, at this level self-efficacy, leadership and ability to cooperate become really important for the researcher if he/she wants to follow the career path in science and education (Report Referencing the Qualifications Frameworks of the United Kingdom to the European Qualifications Framework, 2010, pp. 104-105).

The National Qualifications Framework for England, Wales and Northern Ireland (2010) was developed by the Office of Qualifications and Examinations Regulation in partnership with the Council for the Curriculum, Examinations and Assessment. It consists of 8 levels plus entry level. Learning outcomes become the leading characteristic defining the content of the level. Achievement at level 8 (Doctoral Degree level) “reflects the ability to develop original understanding and extend an area of knowledge or professional practice. It reflects the ability to address problematic situations that involve many complex, interacting factors through initiating, designing and undertaking research, development or strategic activities. It involves the exercise of broad autonomy, judgment and leadership in sharing responsibility for the development of a field of work or knowledge or for creating substantial professional or organizational change. It also reflects a critical understanding of relevant theoretical and methodological perspectives and how they affect the field of knowledge or work” (Report Referencing the Qualifications Frameworks of the United Kingdom to the European Qualifications Framework, 2010, p. 26).

The Credit and Qualifications Framework for Wales (2010) was developed by the Department for Education and Skills together with the Higher Education Funding Council for Wales. There are also 8 levels, the highest (Doctoral) is the last one and it precisely demonstrates the requirement for strong independence in research, good command of research methodology, critical communicative abilities and accountability for outcomes.

National Qualifications Framework of the Russian Federation

National Qualifications Framework of the Russian Federation was developed on the basis of the Agreement on Cooperation between the Ministry of Education and Science of the Russian Federation and the Russian Union of Industrialists and Entrepreneurs. The final version was adopted by the Order of the Ministry of Labor and Social Protection of the Russian Federation “On the approval of qualifications levels for the development of the draft for professional standards”, N 148n, April 12, 2013. National Qualifications Framework of the Russian Federation is represented by 9 levels.

The following descriptors are mentioned: indicators of skill levels – breadth of authority and responsibility (general competence), complexity of the activity (character of skills), science intensity of the activity (nature of knowledge) and the way to achieve the qualification level; however complication of the requirements from level to level is obvious.

In the National Qualifications Framework of the Russian Federation levels 8 and 9 are characteristic of the Doctoral Degree level; however level 8 additionally covers

Master and Specialist stages. Both levels also assume training within additional qualification programs and acquiring practical experience.

The difference between qualification characteristics is clearly indicated by the following parameters.

Level 8

Breadth of authority and responsibility (general competence): defining the strategy, managing the processes and activities (including innovation) with decision-making at the level of large organizations; responsibility for the performance of large organizations and (or) industry.

Complexity of the activity (character of skills): solving research and project issues related to the improvement of the processes' efficiency.

Science intensity of the activity (nature of knowledge): creation of new knowledge of interdisciplinary and intersectoral nature; evaluation and selection of information necessary for the development of the field of activity.

Level 9

Breadth of authority and responsibility (general competence): defining the strategy, managing large technical systems, social and economic processes; significant contribution to a particular field of activity, responsibility for the activity outcomes at the national or international level.

Complexity of the activity (character of skills): solving methodological, research and project issues related to the development and enhancement of the processes' efficiency.

Science intensity of the activity (nature of knowledge): creation of new fundamental knowledge of interdisciplinary and intersectoral nature.

Conclusion

It is quite obvious that the popularity of transnational and national Qualifications Frameworks is steadily growing. Some educationalists even state the existence of 'NQF-[eu]phoria' (Raffe, 2013) meaning that the number of NQFs is rapidly increasing but their impact on the national educational systems is really questionable (Raffe, 2013; Deij, 2014). The idea that all the indicators are focused on achievements rather than just formally on programs or their completion is still not fully accepted by many governmental authorities at the national level. Moreover it is not realized by the students themselves that introduction of such frameworks into national educational systems guarantees recognition of non-formal and even informal knowledge acquisition. Of high importance QFs are for Doctoral level students who are planning their career at the international level and need efficient tools for labor mobility and widening their research geography.

But what is the future for Qualifications Frameworks? Do they have it at all? And what is their impact (if any) on the economic, educational and scientific development of the countries? On the one hand it is rather clear and anticipated – global or regional influences will predominate and national ones in many ways will become synonymous to global. On the other hand it may lead to the opposite effect of changing the strategy from simple policy borrowing (as it is now) to policy

learning. In this case modernization of education, educational quality improvement and scientific and economic breakthroughs are guaranteed.

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Assoc. Prof. Dr. Oksana Chigisheva, Academy of Psychology and Pedagogy, Southern Federal University, Rostov-on-Don, Russia, opchigisheva@sfedu.ru

Master Student Anna Bondarenko, Southern Federal University, Rostov-on-Don, Russia, anuta060693@mail.ru

Senior Lecturer Elena Soltovets, Institute of Philology, Journalism and Intercultural Communication, Southern Federal University, Rostov-on-Don, Russia, hsolt@mail.ru

Tatiana Korsakova & Mikhail Korsakov

Tutor System as a Source of Harmonizing the Educational System with the Needs of Economics

Abstract

The purpose of this study is to identify the sources of harmonizing employers' orders in business and graduates of higher education. According to challenges posed by the economic environment the development of tutor-support system has the great potential to solve the problem. In the paper trends of modern specialists' educational preparation are discussed. New pedagogical position of university instructor in the organization of students' research work is denoted; some historical insight of Tutoring concept is taken; objectives and methodology of tutor-support system is provided.

Keywords: tutor-support system, students' research work, pedagogical position, communication skills, adaptation to future profession

Introduction

In the context of growing global economic and geopolitical turbulence the need for creating a new model of economic growth increases. The ability of organizations to adapt to new business conditions determines their success and provides every country's global competitiveness. Upon this background there has increased shortage of skilled professionals. Thus the results of a global survey conducted by Transnational Auditing Company "PricewaterhouseCoopers" (PwC) among 1300 managers in 68 worldwide countries show that after a period of retrenchment which lasted for several years half of the companies who took part in the study are now ready to resume the recruitment of new employees. Many international organizations already hire graduates and young professionals actively (PwC review, 2014).

However the rapid development of artificial intellect and robotics leads to the increase of the dependence on technology. The inevitable increase in efficiency and new technologies displaces many employees. Nowadays a new type of specialist is demanded. Modern employee is simultaneously the researcher and the strategist, the analyst and the creative director, the manager and marketer equipped with technologies and IT-solutions, without which it is no longer possible to do at a competitive market.

All these changes have a major impact on the development of higher education all around the world and make it possible to see signs and elements of the emerging new model of higher education. There are new types of universities ("problem-oriented" or "innovative" Universities) to train individuals and teams capable of designing new activities and to ensure the transformation of existing corporations, industries and territories in accordance with the challenges of the time. They become the area where the emerging specialists join universal values, expand horizons, get

knowledge and the global professional competencies. The demand for such professionals is growing rapidly around the world due to the increasing global competition, the emergence of new technologies and geopolitical uncertainty.

That is why the objectives and the content of education changes. New tools, educational technologies and the open spaces of social and individual practices appear. The processes of shaping the future specialist are particularly important there. From the point of view of economic-oriented discourse the process of higher education is always distinguished by two components of the educational goals:

- The order of employers – the establishment of clear priorities in the content of education in accordance with the comprehension of competencies and capabilities of each employee that modern business needs;
- The order of the student – the understanding of what he is going to study, what competences he wants to acquire.

Changes of educational technologies are the most controversial issues in modern education. However, the so-called “lecture – colloquium” model is changing, universities introduce active learning methods. The central processes of the new education are communications and researches aimed at solving urgent problems. This approach enables bringing into use the position of tutor and developing the tutor-support system that meets students’ needs and interests and is aims at obtaining new knowledge, new solutions of practical problems, self-education and self-realization of research abilities and skills. It contributes to obtaining competitive behavior skills in interacting with partners, staff and society.

Trends of modern specialists’ educational preparation: economic-oriented discourse

Education is designed to solve problems of economic development and competitiveness of the person in the labor market. It is time for practitioners in education to reflect and develop plans that take into consideration the changing landscape of special education and the impact these changes may have on current and future practices (Gordillo, 2015). The certain set of knowledge and skills doesn’t satisfy the employer anymore. According to most experts there are the basic competencies demanded in modern economics. They are: to carry out the deliberate choice in professional life and take responsibility for it; to communicate effectively and constructively; to interact within various professional, social, national and cultural groups; to improve personal and professional qualities continuously; to solve problems creatively. But what are the qualities demanded in future? The rapid changes in the world show the impossibility of prediction. So, we are to pay attention to:

- Adaptation of knowledge and skills to future conditions and changing situations at the markets;
- Evaluation of actual situation’s significance and its possible consequences;
- Building and maintaining productive communications;
- Defining the strategy of set goals;
- Responsibility for the choice produced.

Knowledge is the basis of students’ modern key competences necessary for the development. Yet the very existence of knowledge does not claim prospects.

Knowledge in itself has ceased to be the human capital. The education system needs to meet the challenges posed by the economic environment. It must not proclaim the value of graduate's qualities, above the value of his economically oriented skills. The ability of the person to coordinate internal and external resources provides him with new opportunities to succeed in a changing world.

The educational process is a multi-factorial science-based system aimed at students' preparation to work in terms of their future activities. The research work of students is an integral part of this process and is inextricably linked with other forms of educational activities. It is the most effective method of development students' motivation regarding creativity, responsibility and independence.

The research work consists of very different processes: application of experimental and observational data; collection of facts and concepts; versatile analysis. This determines the use of the most holistic competence model of the famous British psychologist John Raven. According to him the competence – is a specific ability required for effective implementation of specific actions in a specific subject area, including highly specialized knowledge, a special kind of substantive skills and ways of thinking and understanding, the responsibility for actions (Raven, 2002).

Economically oriented competences, regardless of where in a particular area they appear, require the presence of a high level of human initiative, ability to organize other people to achieve their goals, willingness to evaluate and analyze the social-economic consequences of actions, etc. According to this position the development of sufficient competence can take place at the university only in an organic unity with the students' values. It provides a deep personal interest in undertaking activity. Thus, the organization of research work of students ought to meet the following conditions:

- Creation of the circumstances in which the values are updated and competencies are manifested;
- Creation of conditions for the students' experience acquisition that meets their actualized values;
- Allocation of important tasks which students believe they can cope with.

New pedagogical position of university instructor in the organization of students' research work

The main resource of this approach implementation is the instructor capable of creating a situation of the students' self-determination and self-realization, who has a high personal potential. Adequate, ongoing professional development of instructors who are required to integrate new technologies for students' research work is the challenge facing the higher education (Nagel, 2013). University instructors are expected to have the ability to attack non routine problems and to do so creatively. Therefore, they are expected to collaborate with students, to employ a variety of viewpoints, and ultimately to produce the very knowledge and insight that move their profession forward (Sagor, 2000). The professionalism of the instructor – the supervisor of research is:

- The motives of consciousness, orientation, personal characteristics and other psychological basis to ensure activity's efficiency;

- The level of professional knowledge, skills and abilities, qualifications where personal characteristic plays a role of activity support in its turn.

The main condition for instructor's productive activity comprises a profound knowledge of the subject, methodical kit, the ability to see both the student and the team, skillful use of personal qualities. We pick out such components of pedagogical skills as:

- The nonverbal techniques (that is to "read" the emotional position of students, to use accurate gestures, to organize the optimal space);
- The pedagogical communication (verbal expression: the ability to communicate professionally and constructively, the ability to organize constructive interaction with the students, the ability to work with the vocal apparatus);
- The emotional and volitional self-regulation (self-control, stress resistance, strong-willed regulation, emotional balance).

In comparison with the well-established point of view on professional skills of the lecturer the modern students' instructor must have the following essential features of professional competence: the mobility of knowledge, technique flexibility and critical thinking. The image of the instructor as a full factor of the pedagogical process is of particular significance in the conditions of the organization of research activity of students. The concept of "image" is mostly related to the sphere of politics and business. However the need to create the appropriate image (verbal, external, kinetic) ensuring the harmonious interaction of the instructor with the student and the society is evident.

Thus, the professionalism of teachers capable of instructing students in the course of research activities is regarded as a system of person's integral characteristic and represents the relationship of pedagogical competence, pedagogical skill, professional significant qualities and individual image that determines the unique identity of each instructor, ensuring optimal efficiency of educational activities.

The components of professionalism:

- The pedagogical competence – unity of theoretical and practical readiness for the implementation of research activities with the students, the high level of mastery, methodological (technological) and psycho-pedagogical knowledge and skills;
- The pedagogical skills – knowledge of modern techniques and technology; the ability to form a developing environment, to create favorable conditions for interaction between the subjects of the educational environment; culture of verbal communication, emotional self-regulation;
- The professionally significant qualities of the teacher's personality – the qualities ensuring the success of professional realization;
- The individual image of the teacher – integral, holistic and dynamic phenomenon, internal and external individual characteristics to ensure the harmonious interaction of the subject with nature, society and himself. This approach to defining the essence and the content of research activities with students provides holistic view on instructor's activity and allows introducing innovative academic position – the position of tutor.

Tutoring concept in the history of education

The terms “tutor” and “tutorial” are used in education quite often lately, but in figurative, secondary meanings. Therefore, we believe it is necessary to clarify their basic, original values in order that they could serve as a basis for conclusions.

Phenomenon of “tutoring” is closely connected with the history of European universities, and takes place in the UK. It was born in XIV century in classic English universities – Oxford and a little later – in Cambridge (Barbagira & Fedorova, 1979). The process of self-education was the main process of obtaining academic knowledge and tutoring originally acted as the support of self-education.

Tutors carried out the functions of mediation between the academic and individual education and the task of the tutor was to connect the personal content and academic ideals into practice (Kovaleva, 2002). The scope of tutor activities extends in XVII century. Educational functions began to acquire the growing importance. The tutors advised the students what lectures and practical exercises were the best to visit and to get assistance in all difficulties. Tutor system did not surrender their positions for XVIII-XX centuries, but, on the contrary, it took central position in the oldest universities in England and the lecture system served as a supplement to it (Belitskaya, 2012). Functions of tutors at different periods had a significant impact on the development of educational technologies and institutions (Gordon & Gordon, 1990). The system of tutorial teaching embraces both an ‘institutional’ and an ‘instructional’ aspects. As a pedagogic model, the tutorial system has great value because it creates learning and assessment opportunities which are highly authentic and difficult to fake (Shale, 2000).

Objectives and methodology

The aim of tutor system is to maximize the potential of competitiveness of graduates on the labor market, in the areas of management, business, consulting and research. Its implementation has the following purposes:

1. The development of skills and abilities of creative activity and rapid self-education in accordance with the curriculum and the profile of the acquired specialty.
2. Formation the profound motivational environment of the educational process.
3. Development the ideas of the interdisciplinary nature of any knowledge, education and researches.
4. Development the skills to mobilize obtained theoretical knowledge to solve professional problems.
5. Development of skills to solve the scientific and educational tasks methodically and consistently.
6. Creation of competitive conditions among students; of concentration on the prestige of the future profession.
7. Formation of sustained values of education, creative activity, solving of problems and challenges.

The main purpose of the tutor system is the creation of conditions for supporting student's ability to self-education and self-organization. Tutor support technology is based on the provision of new motives to study with high quality and efficiency. A

small group is the main method of tutoring. Advantages of group methods in the organization of students' research work are obvious. They are:

- Developing of communication skills;
- Using of group interaction methods to develop common solutions;
- Detection of different qualities: leadership, traits of an outsider, an independent member of the team, the critic, the expert;
- Testing the professional skills in a relatively safe situation;
- Development of creativity, original ideas, innovative solutions.

Group method of students' research work is carried out by the program of various activities in order to create and improve skills, enhance the quality and effectiveness of further education. These methods provide the adaptation of students to a higher level of educational activity; eliminating gaps in training; training in new technologies and working practices; rapid preparation for work in the new organization. While organizing the group it is important to solve several questions such as what the objectives of a particular research are; what the needs of the labor market and organizations in the scientific research are; what technology research to use; how to assess the effectiveness of the work.

One of the most popular technologies for this type of activity is the business game. It is directed mostly to the process than to the outcome and it develops psychological functions and abilities required for the effective existence as an employee. The game is a method of constructing the educational process in order to develop a social reality, where almost every employee has to carry out research activities. It includes the following components:

- Acceptance of different roles;
- Using certain rules of action;
- Modeling – creating layouts replacing objects of reality;
- Modeling emotional relationship to the corresponding object.

Business games in the organization of students' scientific-research work will help to identify collective and individual abilities of students, their degree of readiness to professional requirements; to enhance the interest of group members to the educational process, their involvement in the solution of common problems; to imagine the real situation on the labor market, to feel it and to identify possible strategies for their own actions.

Conclusion

Identification of motives, intellectual and physical abilities, knowledge and skills for students' future professional activities makes the tutor-support approach adequate and realistic.

The research activity is inherently the strategy of adaptation of the person to the professional environment. That is why it is the appropriate sphere for tutor's support, it generates professional maturity of the person responsible for their decisions, the ability to plan his actions and choices.

Moreover, such an approach to the organization of students' research work satisfies the demands of the modern labor market as employers need highly skilled, mobile, independent staff.

Only in the case of an active independent work with constructive support the student is ready to accept it as its own, and the most effective. The tutor-support technology generates high professional motivation of the student; it provides maximum identification in the professional environment, the ability and willingness to act in a variety of professional situations.

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Prof. Dr. Tatiana Korsakova, Southern Federal University, Rostov-on-Don, Russia,
takors@mail.ru

Prof. Dr. Mikhail Korsakov, Southern Federal University, Rostov-on-Don, Russia,
mnkorsakov@mail.ru

Elena Kirillova, Boris Kuznetsov, Vasiliy Aleshin & Evgeniy Vodolazhskiy

Psychological Counseling Services in the Universities of Russia and the West

Abstract

The article reveals the importance of psychological counseling service in Russian and foreign universities. During their educational activities students experience the pressure of various stressors associated with it. There is also the specific character of psychological age. The article describes features of the psychological counseling in Russian and foreign universities; it analyzes the existing experience, identifies problem points and indicates the goals of further development of the psychological support services for students.

Keywords: psychological counseling, higher education, psychological service, internal university structure, professional resources, individual and group counseling, intermittent therapy, adaptation

Introduction

In teaching there is often a situation when students turn to teachers with personal concerns. To date, professional psychological support can be found both in preschool institutions and in secondary education institutions. This is a norm and practically no one is surprised by it. But at the stage of higher education this support is cut off as a rule. In the university structure there is no psychological support, when a competent psychologist can do counseling work with a student experiencing certain difficulties. On the one hand, educational activity is surrounded by various stressors and not every young person can adequately withstand their impact. On the other hand, the specific features of an individual's psychological age may provoke a number of experiences which are difficult to understand. The issue of introduction of psychological counseling services into the structure of higher educational institution is important and timely not only for Russia but for foreign countries as well. In European countries and in the USA practical psychology and psychological counseling have a significant experience of their effective development.

Psychological counseling in foreign universities

Psychological counseling in higher educational institutions is closely connected both with the specific character of the educational system and with the cultural, historical, national and political features of a particular country.

The psychological counseling services were widely spread in the 1970s. To date, most US universities are able to provide support to a student experiencing psychological difficulties (Shcherbaneva, 2003).

It is impossible to identify some general therapeutic model used by counseling psychologists in different higher educational institutions. The great variety of the existing theories generates different approaches of professionals to satisfying students' needs. In the practice of psychological counseling in foreign higher educational institutions, various modifications of the psychoanalytic method, cognitive behavioral therapy and family therapy can be found. It is rather the range of problems the professionals encounter that serve as a unifying factor, for example, the use of alcohol or psychoactive substances, anorexia nervosa, bulimia and others (Shcherbaneva, 2003).

Psychological counseling in foreign universities is focused on short-term therapy. This is largely due to a great burden on one counseling psychologist and lack of funding for hiring more professionals. The specific nature of the student's educational process also acts as a restrictor in the psychologist's choice of psychological work. Over the course of five year learning the student faces numerous stressors. This sometimes may result in breaking regular visiting of the psychologist. On the other hand, some unexpected psychological problems may require prompt resolution under the supervision of a qualified counselor.

Students' irregular visiting of the counseling psychologist is viewed as a completely natural behavior. They got accustomed to missing classes; in addition, the crisis periods may be unexpectedly overcome. This behavior causes difficulties for the counselors operating under the scenario of traditional therapy. The quality of the established relationship, the therapeutic alliance, becomes worse (Shcherbaneva, 2003).

Psychological counseling is part of the organizational structure of many universities in the developed countries. It is implemented within the framework of the service of counseling and psychological assistance (CAPS – counseling & psychological service). Its main activity is aimed at correcting mental health disorders of students, faculty and university staff (Annual survey of counseling in further and higher education, 2005).

According to foreign publications, the issues of students' mental health deserve special attention. Establishing psychological counseling in university helps strengthen the mental health of future professionals of industry, business and politics, ensuring the future of the whole country (Brown et al., 2006).

At the turn of XX-XXI centuries in foreign countries there is an increase in the number of the requests for psychological services. With the increased number of university students they have to wait a month for an appointment at a counseling center; meanwhile the staff size of psychological services remains the same. Researchers observe a tendency to deterioration in students' mental health; this is partially reflected in the report of the Board of the Royal College of Psychiatrists (2003). A number of studies note an increase in the number of students using alcohol and psychoactive substances, the spread of anorexia nervosa and bulimia, symptoms of depression, distress, and manifestations of suicidal propensity (Pickard et al., 2000; Webb et al., 1996). Similar problems are reflected in the report of the National Institute for Health Assessment (ACHA, USA) for 2012.

In the current situation, in foreign countries at the level of higher educational institutions various measures are taken to address the problems related to students' mental health. For example, in the UK, Committee for the Promotion of Mental

Wellbeing in Higher Education has been founded, principles of strengthening students' and faculty's mental health have been established and documented. Instructions for university staff were introduced to ensure the safety of students' mental health. In fact, the responsibility for the development of a mentally healthy student rests not only on a separate structural unit, but on the entire staff of a higher educational institution (Royal College of Psychiatrists, 2003). Yet in the teaching-learning process the teacher is the closest to the student; in this regard, the requirements for his/her competence in the field of psychological health are increasing. Another important element of psychological counseling in university is a tutor (mentor), who, functioning as a "dispatcher", can find out a problem in a timely manner and help the student turn to a relevant professional.

In the University of Toronto psychological counseling is carried out through a corresponding service which is part of the organizational structure of the educational institution. The scope of the services provided and their forms are in many respects similar to the University Consulting Service in Cambridge. Psychological counseling is provided free of charge, which is typical of most foreign universities, but in case of missing a session without notifying the counselor a fine of \$ 30 is imposed. As in many foreign universities, only a short-term therapy is provided, which enables responding to more requests. However, if necessary, a staff member or a student can get an in-depth psychological assistance in the psychological center.

In many foreign countries the organized psychological service is comparatively young. The average number of counselors in one university in the USA and the UK is about 30 professionals. In Germany, Czech Republic and Estonia the number of psychological service professionals is about five. The specific character of the activities of these services is largely determined by their place in the organizational structure of a particular institution. For example, the German university provides psychological counseling through information and counseling centers which are also engaged in vocational guidance, social and legal consulting. CAPS staff members are outside the academic activity, which helps them focus on the role of a counseling psychologist.

Foreign universities, try to place psychological counseling services outside the educational institution in order to preserve the confidentiality of the student or employee seeking psychological help. In addition, foreign universities are actively developing the use of information technology for psychological counseling. In particular, online counseling is being implemented, which makes the access to a psychologist's help easier and more convenient for young people. Although this approach allows clients to keep the anonymity it cannot substitute for a face-to-face session and is only an addition to the traditional counseling.

Psychological counseling in higher educational institutions of Russia

Psychological counseling in higher educational institution is typically carried out through a separate structural unit that is often denoted as psychological service. The rudiments of using psychological counseling appeared in the 1920s; they could be observed in the activities of professional counseling bureaus and laboratories connected with industry and educational activities. The 30s in Russia were very tragic for the applied psychology. The branches such as pedologia and psychotechnics had been destroyed. The resumption of the development of

psychological counseling within education can be associated with the 70s, when the need for social practice and achievements in the areas of psychology of labor, pedagogical psychology, etc. becomes greater.

In Russia, the formation of the first psychological service in the university structure is associated with the initiative of B. G. Ananiev's students; in his studies he considered features of student personality structure (Kaltayeva, 2001). Ananiev's students established psychological services at the Novosibirsk Electrotechnical Institute; B. G. Ananiev himself supervised it at the initial stages.

Another attempt was made at the end of the 70s of the 20th century at the initiative of the Associate Professor of the Chair of Pedagogy and Psychology of Kazan State University, N. M. Peisakhov. He and his colleagues managed to create psychological service, to define its main goals, tasks and functions (Olifirovich et al., 2009).

Also, in the beginning of the 70s other higher educational institutions kept opening psychological services, but unfortunately they soon stopped functioning; partially because students and faculty were not interested in their work.

The development of psychological services at the level of preschool and secondary educational institutions greatly contributed to the introduction of the practice of psychological counseling into the activity of the university. In Russia's society, a new image of a psychologist gradually started to form; people began to show interest in psychology. However, it is wrong to extrapolate the methods of psychological services of secondary educational institutions to similar services of universities (Kolosov, 2009).

In our country the development of the psychological services in the context of educational activity is connected with the research by I. V. Dubrovina. She is the author of the experiment associated with the introduction into the structure of secondary education a position of psychologist (1982-1988). The obtained results formed the basis for the Regulation on the Psychological Service of Public Education which was actively used in the USSR.

I. V. Dubrovina (1998) proposed the following list of the main problems with which students turn to a psychologist:

- Subjective feelings about problem relationships with other people (shyness and fear preventing communication, non-acceptance by others);
- In-family problems: parents' lack of understanding, struggle for independence;
- Problems in the psychosexual domain (the boy-girl relationship, intimate complexes, sex, pregnancy, etc.);
- Existential problems;
- Problems of leisure and addictive behavior.

Another stage of the development of psychological services in the university structure was in the 90s of the 20th century; it is associated with the development of the personality-oriented approach in educational activities. In this period some higher educational institutions took part in implementing the Higher School of Russia program; in its context a scientific and methodological support of the psychological service was formed (Arsenieva, 2006).

Special attention should be given to the topic of psychological support for vocational education raised by E. F. Zeer (2003), since it reflects the vocational

orientation context of the psychological counseling in the university. Zeer (2003) examines the conception of professional education through the prism of the personality-oriented paradigm of higher education. The author notes that the choice of the future career by graduates has little to do with the choice of a higher educational institution. Indeed, the problem of professional identification in the face of a large number of options sometimes seems to paralyze the student, allowing circumstances to determine the future career.

In the last decade, the issues of introducing psychological counseling in Russia have been given more attention. For example, at the All-Russian Conference “The Role of the Service of Practical Psychology of Vocational Education Institutions in the Implementation of the Strategy of the State Youth Policy of the Russian Federation” held in 2007, the need for the development of psychological services in Russian universities was recognized. T. N. Arsenieva (2006) notes that the importance and timeliness of vocational practical psychologist service cannot be doubtful even for hardline skeptic bureaucrats.

To date, psychological counseling as a component of the psychological service exists in some Russian Universities of Moscow, St. Petersburg, Nizhny Novgorod, Tver, Kazan, Rostov, Astrakhan, Arkhangelsk, Kursk, Tomsk, and others. However, it is more often connected with the initiative of the faculty of humanities. The general model describing goals, tasks and methods of counseling has not been formed yet. Despite this, it is possible to distinguish similar areas of activity and common methods of work that are to a great extent based on the experience of secondary school psychological services (Kolosov, 2010).

Psychological counseling in university can be implemented in two lines: actual and prospecting. The actual one addresses students’ difficulties directly related to learning, development, deviant behavior and communication problems. The aims of the prospecting line are the development of students’ professional features, providing assistance in self-determination and strengthening students’ mental health (Zeer, 2003).

It is evident that the problem of introducing psychological counseling into Russian universities is recognized and its solution depends largely on creating a psychological service in the university structure. The general objectives of this structural unit in general terms are outlined, but it is not enough. It is possible to identify a number of interconnected factors hindering the development of psychological counseling in the university structure. For example, it is not quite clear what principles and methods will be used by a psychological counselor in his/her work; who and how will be responsible for the outcome of the psychological work; how the psychological service will be financed; and how to evaluate a counselor’s work.

Psychological services are quite a young structural unit in a number of Russian universities, existing for 10-15 years. The difficulties they encounter are quite typical: lack of regulatory framework for the activities; poor material and technical equipment; professional resources; weak integration into the educational environment.

In order to provide psychological services with professional resources, it is important to determine the number of counseling psychologists necessary for solving the tasks. For the Russian higher educational institutions the standards of

workload for a psychologist have not been developed. These standards are developed for secondary education institutions; however, as practice shows, they do not correspond to a psychologist's real opportunities and require revision.

In addition, factors related to the adaptation of freshmen to the new educational process should be mentioned: dissatisfaction with training, inability to withstand a new high rate of life, unpreparedness for new ways of the perception and processing of information, student anxiety, inability to systematize knowledge, physical fatigue, lack of self-presentation skills in a group, unpreparedness for self-expression in learning activity.

From this it follows that the work of the psychological counseling services should be aimed at making the adaptation period of first-year students easier. It is not always that the students can independently adjust to new requirements; and in case of failure, the risk of the negative impact of disadaptation on the development of personality characteristics is higher.

It is also important to mark the main lines of the counseling psychologist's work in the Russian university structure. First, it is individual and group counseling aimed at personality and professional self-determination of students. Today one can often see a fourth year student who cannot imagine himself/herself working in the profession for which he/she has acquired competencies. Second, an important line of psychological services is counseling for the university teachers. Focusing on educational activities, the counseling work can be aimed at developing competent communication, reflexive activity culture, orientation to dialogical communication with students and avoiding an authoritarian model.

The previously identified problems hindering the introduction of psychological counseling in the educational activity of the university play an important role in forecasting further development and determining main current tasks:

- development of theoretical and organizational basis for the university psychological services work;
- development of normative documents (primarily of the federal level) regulating its work;
- creation of methodology centers supervising psychological services professionals;
- having regular meetings, seminars and round tables that enable learning and exchanging the experience;
- scientific and methodological support for the activities of professionals working at psychological services (publication of educational and methodological manuals containing information necessary for the work of the services, as well as the creation of a site on which methodological information, diagnostic techniques, developments and documents will be posted) (Kolosov, 2010).

Conclusion

The functional contents of psychological counseling services in Russian and foreign universities is different. Their views on the professional resources of the services necessary for valid functioning also differ. However, the ideas about the main goals and lines are similar.

Particular attention in the foreign university psychological counseling is given to the student's mental health and methods for its strengthening, as well as to the preventive control of disorders caused by the use of alcohol and psychoactive substances.

The work of a psychological counselor in foreign universities is legally regulated, which provides legal protection to the counselor and the client. In its turn, the lack of legal basis and regulation of activities at the federal level is one of the main problems hindering the introduction of psychological counseling services in the organizational structure of Russian universities.

The number of professional psychologists in psychological counseling service in foreign universities is greater than in the Russian ones. In the UK universities, the current standards of the workload of a counseling psychologist working all day long are 3,500 students per counselor. For the Russian universities the workload standards have not been worked out yet, although the actual load is sometimes more than 3500 students per counselor in some universities.

Establishing psychological service in Russian universities depends largely on the social and economic situation in the country. However, the key problems are lack of a legal and regulatory framework for psychological counseling, residual material support for the existing services, and an insufficient level of professional resources.

In many developed countries psychological counseling is recognized as a necessary component of the organizational structure of the university. In some foreign countries this process is going on quite intensively and is supported by the state by providing the services with the necessary material and technical means. In Russia, one can observe formation and development of full psychological services in the internal structure of university.

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Prof. Dr. Elena Kirillova, Institute of Constructing and Technological Informatics RAS, Moscow, Russia, kea-31@yandex.ru

Assoc. Prof. Boris Kuznetsov, Moscow State University of Technology "STANKIN", Moscow, Russia, b.kuznetsov@stankin.ru

Prof. Dr. Vasilij Aleshin, Moscow State University of Technology "STANKIN", Moscow, Russia

Assoc. Prof. Dr. Evgeniy Vodolazhskiy, Moscow State University of Technology "STANKIN", Moscow, Russia

Svetlana Melnikova & Ludmila Petrenko

Experience of Teaching Drawing in German Schools by A. Ažbe and S. Hollósy (on the Example of the Image of Human Head)

Abstract

The main aim of the paper is to analyze and disclose the methods for teaching drawing of the human head in foreign schools at the end of the 19th and beginning of the 20th centuries for further application in modern Russian methodology of art education. The relevance of the problem under investigation is due to the structuring and disclosure of the specificity of teaching methods in foreign schools of A. Ažbe and S. Hollósy. The main advantages and disadvantages of these schools are considered. It is stated that modern Russian teaching methodology focuses on the methods of drawing, built on the influence of the German school and applied directly to the tasks of art and art and architectural education. As a result of the research, organizational and content characteristics of the educational process in contemporary art education in accordance with foreign experience, German art studios, pedagogical and creative practice are determined.

Keywords: academic drawing, human head, teaching methods, artist-teacher, realistic approach, German schools

Introduction

In modern art education, the quality of the professional training of artists should depend directly on the scientific and systematic improvement of teaching methods. A huge role here is given to the artist-teacher not only as a mentor, who conveys own invaluable experience and knowledge, but also capable of providing functional and effective training of students. There is no doubt that classical art education remains important as in many countries it has partially or completely lost the traditions and principles of teaching drawing based on the gradual development of graphic literacy from simple to complex, gaining skills from year to year.

In this regard, we turned to the study of German historical experience of teaching academic drawing of human head as one of the manifestations of realistic and scientific direction. The analysis of previous generations' experience is a valuable prerequisite for the development of new modern teaching methods in the prevailing conditions and the ability for their further creative use. Understanding of the essence and structure of teaching methods changed during the formation of various art schools that combined certain methodological principles of the artist's training.

Among the most well-formed at the end of the 19th and beginning of the 20th century, it is possible to define West European private art schools by the artist-educators A. Ažbe and S. Hollósy.

The analysis of these schools' experience was conducted by the most prominent scientists in the field of artistic pedagogy for many years. Many studies are devoted to the problem of representing the form and studying the ways of depicting human head on the drawing, developing methods for the effective mastery of graphic literacy. As a part of this study, it was traced to what extent these two schools affected Russian art education, in particular Russian artists who studied abroad. Such a statement of the issue within scientific study of German artists and teachers' heritage has not yet been considered. In this regard, it seems relevant, because, in the Russian teaching practice of human head drawing it was always important to perceive it as a method of studying forms and as an independent type of creativity which experience is built to some extent on the influence of German school.

The empirical corpus consists of the memoirs of contemporaries as well as students who were directly trained in German art studios that are currently represented in the electronic form.

At present, the theory of art education directly approaches scientific methods for the formation and improvement of the system of academic drawing of the human head for their subsequent unification at all development stages of the future artist.

It seems reasonable to consider pedagogical methods of German schools and their relevance in contemporary Russian art education.

Pedagogical methods of teaching

At the end of the XIX century the academic system of artists' training needed to be updated and reformed as shown by the historical review of the development of artistic and pedagogical concepts of the XVIII-XIX centuries European educational institutions. Significant changes also affected the teaching methods of academic drawing as well as painting and composition. In the art academies and studios individual artists developed new forms and methods of teaching the fine arts.

Much attention from the point of our research deserves the private school of the Slovenian artist and teacher Anton Ažbe (1862-1905) that was founded in 1891 in Munich and received further international recognition. A. Ažbe accepted professionally trained artists to his school. The drawing was taught using only charcoal and the attention of the students was focused on the construction of the form as well as competent distribution of the volume elements.

Many students who studied at A. Ažbe's school became outstanding masters of Russian art: D. N. Kardovsky and I. E. Grabar, E. K. Makovskaya, M. F. Shemyakin, V. V. Kandinsky, K. S. Petrov-Vodkin, M. V. Dobuzhinsky and others. Investigation of the methodical system of the author's school alongside with the facts and memories of A. Ažbe's students – I. E. Grabar and M. V. Dobuzhinsky, allows us to apply and supplement the elements of this system in the modern domestic art education of students, in particular when drawing human head.

Over the course of fourteen years of teaching, the "ball system" was introduced into his method of teaching drawing that consisted in the sequential construction of the form using the basic tonal gradations. At the same time, the main emphasis was on the principle of great form. The only important things were the "big line" and the "great form" (Grabar, 2001, p. 119). Organization of the learning process included identification of the development degree of the abilities of young artists and determination of the weak side of the previously received professional training

thereby establishing further way for overcoming obstacles. According to A. Ažbe it was called “knocking off the arrogance” and determined successful completion of the educational work. Thus, the students had to rethink previously obtained methods in their works which they considered to be the only correct ones before acquaintance with the artist and teacher A. Ažbe.

Anton Ažbe’s pedagogical system was based on the realistic approach to the creation of the image, generalization (analysis) and simplification of the form. At the initial stage, depicting the complex shape of the human head, the construction was analyzed according to the principle of the ball, at the heart of which the sum of simple geometric forms was considered followed by the identification of the elements of chiaroscuro, alongside with this a great form was determined, the general proportions of the head were established. Similarly to the same principle students performed all the other elements of the face (eyes, nose, neck etc.).

The main advantage of the following principle of work when drawing the head consisted in the determination of the main large mass – planes (the shape of the nose, cheekbones, forehead) with the subsequent transition to particular details.

According to the memoirs of M. V. Dobuzhinsky when “analyzing the shape of the human head, Ažbe interpreted it as a polyhedron with the front, side and intermediate planes...” (Dobuzhinsky, 1987, p. 149).

Then the young artist got acquainted with the principle of tonal shape modeling. The essence of this principle consisted in the concretization of the represented form, gradual revealing of design features with the help of black and white light and shadow relations. When drawing A. Ažbe attached great importance to the bone base of the head and required knowledge of the muscular skeleton and its anatomical features.

So, A. Ažbe’s drawing of human head consisted of four basic sections:

- representation of a large image;
- creation of the volume of human head;
- identification of the surface structure (tonal shape modeling);
- anatomical justification of the image.

The main disadvantages of this teaching method at school were:

- the absence of gypsum models images;
- the use of only soft graphic materials;
- the work with professionally trained students;
- schematicization of drawings, reaching the degree of mannerism;
- one-sidedness of the method for teaching drawing.

But the abovementioned drawbacks of the methodology do not cross all the advantages of its clearly established author’s methodology.

Alongside with the training methodology developed by A. Ažbe, which mainly shapes professional perception, consistent and systemic drawing of human head (adherence to the correct methodical technique of work), in 1886 a Hungarian artist-teacher S. Hollósy determined attempts to find another way of teaching the student. It is important that in his art school the priority was given not only to the constructive and analytical drawing, but also to the requirements of wholeness and form analysis.

Analysis of foreign schools influence on modern domestic methodology of art education

Pedagogical system of training by Simon Hollósy attracted many young artists who did not receive satisfaction from the generally accepted academic education. One of them was V. A. Favorsky whose method of creative activity and theoretical formation of the laws of fine art were formed in the process of assimilating the basic laws of graphic literacy from the lessons by Simon Hollósy.

V. A. Favorsky studied under S. Hollósy together with K. N. Istomin. From 1906 to 1909 they learned well the method of form and thinking cognition, the principle of wholeness of perception and image from the German school of realistic drawing. Hollósy's methodological guidelines in the system of teaching drawing were based on the deep understanding of the form, careful study and depiction of nature, its true reality, connection with the surrounding space and denied the transmission of illusiveness and copying of objects. From his disciples he demanded a creation of constructive-spatial structure of the head shape, initial stage analysis of the volume as a matchbox with twelve ribs and marking of its visible and invisible planes and parts – eyes, nose, back of the head etc.

In addition to the rigorous analysis of the form design, they were given the opportunity to choose their own methods of work in the future.

From the memoirs of his students it is known that permanent trips to a small Transylvanian town of Nagybánya where summer creative workshops were organised served as an inexhaustible source of creativity for S. Hollósy. Regular plenaries with students provided not only spiritual communication with nature, but also helped to perceive nature and depict it as completely as possible, applying all the methodological provisions characteristic for drawing and graphic literacy.

There is an interesting reasoning by V. A. Favorsky about drawing from nature. He pointed out that the drawing should not be passive in relation to the nature, rigor and freedom from prejudiced opinions about things are needed (Favorsky, 1988, p. 255).

As an example, when depicting human head, at the initial stage we must “free ourselves” from the knowledge that characterizes the given object (face, eyes, nose, lips etc.) and present it as an abstract form. A holistic perception of the form must remain as the most important condition for the transmission of the three-dimensional, volumetric world in the artistic work.

Stressing the importance of the outline, he argued that the graphic art (drawing) is a work of lines that is not a sum of points, but is a result of movement. This very mobility, the stroke that expresses movement, forms the basis of graphics, all the rest is painting. Painting can be static, plastic, spatial, and graphics is an in-depth movement.

At the same time, when analyzing field studies of students who completed Hollósy's training it is possible to conclude that the school paid serious attention not only to the line expressing movement, exploring from different angles the object as a part of an integral space, but also to the transmission of three-dimensional expressiveness and man's inner world. Along with the drawing a special role was given to composition.

It follows that both German art schools proclaimed a method of form cognition based on the principles of addressing nature, studying the laws of nature and

methodological rules of doing work. Personal display of teachers, as one of the teaching methods, was carried out only in the form of various schemes for building students' work at free fields, enabling independent development of graphic technique.

At present, the postulates of the Ažbe and Hollósy's school are represented in the modern method of constructing a linear-constructive drawing, in the concept of the form and laws of its structure, applied directly to the tasks of artistic and architectural education developed by the Russian artist-teacher N. Li, and also in the perfectly adapted method of constructive anatomical analysis of the complex form by the German scientist G. Bammes. In addition, similar to the technique developed by A. Ažbe, N. Radlov provides a detailed description on the essence of the volumetric drawing method in the book "Painting from nature" (Radlov, 1978).

In his opinion, the essence of the academic teaching method was volumetric drawing during the heyday of academies. This method of teaching remains relevant and is currently the only basic school of system drawing. An outstanding scientist of art pedagogy N. N. Rostovtsev (1981) proposed his method of analyzing the generalized form of head, introduced refinements into the pattern of its formation. To study this method, he gave a detailed description of special exercises and accentuated the main necessity on the reception of "cutting".

V. A. Mogilevtsev in the tutorial "Fundamentals of drawing" (Mogilevtsev, 2007) in the first section "Head" considers the sequence of work, emphasizing the importance of careful study of the Russian academic school of drawing. In the practical part, he represents in detail his own scheme for depicting a complex shape of the live head model, clearly showing the relationship of shape and cutting points of planes, comparing them with the classical works of outstanding masters.

Conclusion

Thus, the heritage of the teaching experience by artists-teachers A. Ažbe and S. Hollósy is still acute today and one of the strongest in the domestic teaching to draw human head. In the content of the educational process in contemporary art education it is possible to trace a variety of different ways, rules, requirements of realistic drawing of human head. The possibility to use the methodological principles of these schools in the professional activity shows a convincing and expressive nature of the academic drawing of human head. Thorough application of the method of "cutting", as practice shows, allows the students to assimilate the treatment experience by the outstanding masters of the past and gives them an opportunity to think deeply as future artists, analyze the shape of the head and the laws of its construction. Moreover, the German school not only teaches to think, but also consciously approaches the process of depicting a full-scale production.

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Senior Lecturer, Svetlana Melnikova, Southern Federal University, Rostov-on-Don, Russia,
hilicera2001@yandex.ru

Teacher of the Art Department, Ludmila Petrenko, Children's Art School No 5, Voronezh,
Russia, art.zima2011@yandex.ru

Intra Lūce

Short Cycle Higher Education Development in Latvia

Abstract

Education plays an important role in the economy and everyday life since economic well-being largely depends on the knowledge, skills and proficiency of the labour force. Thanks to the Bologna reforms, students and graduates are able to move freely throughout the European Higher Education Area (EHEA) where qualifications are recognised as well as study stages and study programmes allow students to acquire knowledge, skills and competence. At the same time, it should be admitted that structural reforms are unevenly carried out within the EHEA, for example, provision of short-cycle education and practical implementation of standards and guidelines for higher education in Europe. Although the Bologna process is a voluntary one, it calls for urgent action to create a system of academic degrees in order to facilitate mobility of students, educators and researchers and ensure quality education and training, i.e., the degrees acquired at any higher education institution anywhere in the EHEA will be appropriately recognised elsewhere in this area both to continue studies and to participate in the labour market.

Keywords: short-cycle qualifications, short-cycle, mid-level specialists

Introduction

Knowledge and skills are necessary to make one participate in the labour market. Employers recognise the importance of education and require that prospective employees are educated and competent in their speciality and, thus, specialists with higher education would likely enjoy an advantage. Rapid changes in the economy and globalisation processes mean that nowadays it is not enough to have basic knowledge and employees should constantly update their professional qualifications. Today it is no longer possible to acquire knowledge in 4–5 years that would be sufficient throughout one's professional lifetime because knowledge tends gradually to become out-of-date. This has led to the development and function of a national system of life-long learning so that those already employed would be given an opportunity to improve their competitiveness, raise their qualifications, and improve work efficiency, thus contributing to the gross national product and their well-being.

Short-Cycle Higher Education (SCHE) as the first level of higher education and the fifth level of the European Qualifications Framework (EQF, 2008) has become increasingly important over the past decade. A growing number of countries involved in the Bologna Process give the underlying programmes a formal position in their education system linked to a national qualifications framework.

In 1973, the Organisation for Economic Cooperation and Development (OECD) defined short-cycle higher education as “[...] postsecondary education of shorter duration with strong vocational elements, generally under the non-university sector of higher education [...]”. Today, the issue is still at the forefront of policy debates

in many countries because of more international uniformity resulting from the Bologna agreements (Cheps, 2012).

Short-cycle education

The Bologna Process initiated by the Bologna Declaration and adopted in 1999 has resulted in fundamental changes in the European Higher Education Area.

The most important aspects of education within the Bologna Process are life-long learning, employment issues, financial support, system of degrees conferred, degree of openness to the outside world, data collection and quality assurance (The Bologna process: setting up the European Higher Education Area, 1999).

The “Europe 2020” strategy as adopted by the EU sets forth the obligation of states to make their educational system open to others and raise their significance, develop national qualifications systems and ensure that the criteria for success relate to the needs of the labour market (COM, 2010).

The Recommendation of the European Parliament and of the Council of 23 April 2008 on the establishment of the European Qualifications Framework for life-long learning is a significant step taken in achieving the aims listed above. The European Qualifications Framework (EQF, 2008) consists of eight levels whose goal is to promote life-long learning and facilitate mobility of the residents of different countries. By establishing reference values attributable to qualifications obtained in different European countries, the EQF indicators allow for easier and more accurate comparison of these different qualifications. The EQF indicators describe the level at which an individual has acquired his/her knowledge, skills and competences.

Each of the 8 levels is defined by a set of descriptors indicating the learning outcomes relevant to qualifications at that level in any system of qualifications.

The Framework for Qualifications of the European Higher Education Area provides descriptors for cycles. Each cycle descriptor offers a generic statement of typical expectations of achievements and abilities associated with qualifications that represent the end of that cycle.

Associate degree refers to the qualification awarded after successful completion of the so-called short cycle in the EQF Higher Education Area. The short cycle fits within or is linked to the first cycle (or Bachelor’s level). The degree requires approximately 120 ECTS credits.

Undoubtedly, short-cycle education, in the light of the Dublin criteria (Dublin descriptors, 2008), as well as the EQF complies with EQF level 5 (EQF Level 5, 2008); thus, graduates acquire the relevant knowledge and skills at a level higher than that of general education and are qualified either to work or to pursue a profession or to continue studies in order to complete the first cycle of higher education. This means that short-cycle education will satisfy the demand of the labour market by educating and training mid-level specialists that are in demand. The challenge posed to short-cycle education is therefore to implement an intensive study programme that results in knowledge, skills and competences imparted to students in a particular field, which will permit graduates to develop novel or improve existing systems, products and technologies, as well as prepare the graduates for pedagogic work in their field. Short-cycle education should ensure that students reach a certain professional level of knowledge and are able to

independently take decisions, defend their choice, identify all technical and organisational problems encountered in the respective professional area, react to rapidly changing situations in a timely manner.

Short-cycle education in Latvia does not have a long history behind it. It was introduced in 2000 through changes in the Law on Higher Education. However, elsewhere in the world this form of education has a longer pedigree, for instance, in America where this form of education has been available since 1901. The legal basis for short-cycle education in Latvia consists of the Law on Higher Education Establishments, the Law on Vocational Education and the Regulation of the Cabinet of Ministers “On the State Standard of First-Level Higher Vocational Education” (2001).

Short-cycle higher education is higher vocational education that lasts 2–3 years (120 ECTS – 180 ECTS).

The issue of non-university higher education, which is practice-oriented vocational training, has become topical since the beginning of the Bologna Process.

Non-university higher education began in Europe during the 1960s and 1970s when higher education ceased to be an elite pursuit and became a mass phenomenon. Consequently, the relative number of students in their age group increased from 8%–10%, and even approached 25%–30% in some countries. Once it became apparent that providing higher education required financial resources, it was found that studying at the university for a long period of time could not be financed to meet the demand for it. It also transpired that young people themselves were willing to acquire professional skills and enter the labour market as quickly as possible. It was found that educating as many as 30% of youth to the level of Master’s degree was inefficient as graduates holding a Master’s degree were ready to pursue research, had great ambitions to find a highly-paid job. However, in real life it turned out that such a large number of Master’s degree holders would find work that would take advantage of only part of their abilities – principally professional knowledge and skills rather than academic knowledge.

These problems became apparent in Latvia during the 1990s, as expressed in rhetorical questions posed by Andrejs Rauhvargers, former Vice-President of the European Network of Information Centres (ENIC) and Director of the Academic Information Centre of Latvia, “Do we face the same problem as Master’s degree holders do when after six years of study they often work at a job that requires all of their limited professional skills and only a fraction of the accumulated academic knowledge, don’t we? Are we so wealthy that we can afford to educate a specialist over five or six years, given that in the real world three years would suffice? Is it not the case that employers often accuse graduates from higher education establishments that they lack practical knowledge and skills?” (Rauhvargers, 2002, p. 37).

At present, the theme under consideration is topical since rapid changes in the economy as well as globalisation processes require employees to constantly develop their professional qualifications. As already mentioned, today it is no longer possible to acquire knowledge in 4–5 years that would be sufficient throughout one’s professional lifetime because the acquired knowledge tends to become outdated. Employers also require that prospective employees are educated and competent in their field.

Approximately one-fifth of all employees are over-qualified for their daily tasks. The study of the mismatch between education and the needs of the labour market has identified two key phenomena: over-education and under-education. In several European countries, there are between 10% and 30% of overeducated employees, and about 20% of undereducated employees. In certain countries, overeducated employees account for approximately one-half of all employees, for example, 45% in Russia, 36% in Ukraine, 26% in Cyprus, 24% in Lithuania, and 18% in Latvia (Tarvids, 2016). A simple example: an individual with a Bachelor's and even a Master's degree works as a cleaner; alternatively there is the phenomenon of excessive expectations and pre-conditions, for example, someone with experience in international project management has the post of assistant director at a small enterprise in the local market. These examples show that the labour market needs more mid-level specialists with a sound education and good professional skills and fewer specialists with the highest level of education.

Thus, short-cycle higher education plays a significant role within the system of higher education in most countries. At present, there are differences from country to country within the European Higher Education Area as how other higher education institutions recognise qualifications gained as EQF level 5. For example, short-cycle education corresponding to EQF level 5 has been introduced in Latvia, the Netherlands, Belgium, France, Denmark, etc. At the same time, in the Czech Republic, Estonia, and Austria EQF level 5 is understood as further vocational education, in the United Kingdom (Scotland) – as a qualification gained through general education, and it is not practised at all in Lithuania. There are also differences in terms of the degrees conferred, for example, in the Netherlands this is an associate degree, in Latvia – a diploma of first level higher vocational education; in Malta – an undergraduate diploma, in the United Kingdom – a foundation degree, and in Ireland – a higher certificate.

In view of the fact that the Bologna Declaration clearly sets out three distinct levels of higher education, including the degree conferred at each level, this should also be implemented for the system of short-cycle education, defining it to be part of the first cycle of higher education and proposing to confer an associate degree at completion of the study programme. The experience of the Netherlands can be seen as an example to emulate, i.e., an associate degree was given official standing in 2006 as the outcome of two years of study at a higher education programme. Prior to this date, the Netherlands had undertaken a trial period to understand what this new qualification would comprise. As of 1 September 2013 the associate degree is legally defined as a new qualification that is based on the Law on Higher Education and Science and with this step short-cycle education programmes are part of the framework of higher education qualifications fully conforming to the Dublin descriptors.

The demand for short-cycle education is increasing year by year as there is a steadily rising demand for mid-level specialists. In respect of the situation in Latvia, the number of students enrolled in short-cycle education programmes increased four-fold between 2003 and 2015. In academic year 2003/2004 only 5% of all students in higher education were pursuing short-cycle studies; in academic year 2009/2010, this number was already 12%, whereas in academic year 2014/2015 20% of all students in higher education were enrolled in short-cycle study

programmes in Latvia. The Netherlands adopted a goal of having 20% of all university students in applied science disciplines to be enrolled in an associate degree programme.

According to the study on the demand for labour in the medium and long term carried out by the Ministry of Economics of the Republic of Latvia, at present there is a strong demand for specialists and it will also persist in the future, in particular, the demand for mid-level specialists. Hence, the number of individuals enrolled in the SCHE programmes will rise by 17.3% by 2030. The same study predicts that in 2030 job openings for individuals with higher education, including – SCHE, will comprise half of all openings. A similar trend is also expected in other EU member states (Ministry of Economics, 2013).

As mentioned above, demand is steadily rising throughout the world for SCHE due to the increasing demand for mid-level specialists in job markets. In its forecasts, the European Centre for the Development of Vocational Training (CEDEFOP) predicts that demand will grow steadily for specialists with vocational qualifications up to 2020 (CEDEFOP, 2011).

Daniels Pavluts, former Minister of Economics, has made the following observation, “If we wish to become rich and avoid mass immigration, we should return to basics and teach engineering and exact sciences. Our real problem is a relatively large number of young people who enter the job market without any qualification or skill. Additionally, there are a large number of individuals in the job market who have received only elementary education and in 2020 this number may reach 127 thousand. At the same time, the demand for this kind of workers will fall, reaching 75 thousand in 2020” (Pavluts, 2013).

The Latvian Investment and Development Agency has issued a forecast of in-demand future professions in Latvia in such fields as transport and logistics, woodworking, commerce and administration, electronics and mechanical engineering, information technology, etc. According to the Ministry of Economics of the Republic of Latvia, there will be a demand for nearly 4500 IT specialists in Latvia by 2020. There is a lack of nurses, surveyors, telemarketing specialists, and others in the labour market (Latvian Investment and Development Agency, 2014).

There are an increasing number of employers who when confronted with an insufficient number of local mid-level specialists are ready to employ workers from third countries.

It has already been noted that SCHE (first level higher vocational education) has been implemented in Latvia since 2000. In 2003, there were 13 colleges in Latvia (9 state and 4 privately owned); today their number has reached 25 (17 state and 8 privately owned ones). SCHE programmes are also offered by five higher education institutions in Latvia (Ministry of Education, 2015).

In Latvia, colleges offer 99 accredited vocational study programmes. The largest number of study programmes is in the field of health care, i.e., 18 study programmes. The next most numerous category is in the field of property management and administration comprising 13 study programmes. The smallest number of study programmes is offered in the fields of agriculture, forestry, fisheries, veterinary medicine and food safety – 1 study programme, chemistry, chemical technology and biotechnology – 1 study programme, environmental protection – 1 study programme, and information and communication science – 1

study programme. At present, there are no study programmes offered in the fields of mathematics and statistics and veterinary science (List of accredited study programmes, 2015).

This trend is largely driven by the fact that short-cycle education can easily adapt to the demands and requirements of the labour market, educate and train competent specialists in a short period of time, thus raising the employment rate of graduates and decreasing the unemployment rate.

The importance of short-cycle education has been emphasised in the Yerevan Declaration (Ministerial declarations and communiqués, 2015), in which ministers responsible for higher education in the European Higher Education Area agreed to include provision for recognition of short-cycle education in the European Qualifications Framework (QF – EHEA), taking into account the Dublin descriptors and conforming to European standards and guidelines for quality assurance; they also agreed to adopt regulations that higher education institutions in their countries would recognise short-cycle education qualifications even in cases when short-cycle qualifications were not part of their national education system.

The “Europe 2020” strategy as adopted by the EU sets forth the obligation of states to make their education system open to others and raise their significance, develop national qualifications systems and ensure that the criteria for success relate to the needs of the labour market (COM, 2010).

Conclusion

At present, the Latvian higher education institutions practically offer the three-cycle Bologna programmes, including short-cycle higher education as part of the first cycle, upon completion of which a Bachelor’s degree is awarded. Latvia was one of the fifteen European countries that already by 2012 had completed the process of alignment of its national qualifications to the European Qualifications Framework. However, in order to strengthen the short-cycle higher education in the framework of education, Latvian laws and regulations on education should envisage that upon completion of short-cycle education an associate degree is awarded and it is part of a professional Bachelor’s level (2+2). It is important to note that the short-cycle higher vocational education provides an opportunity to quickly obtain quality education and professional competences that allow immediately entering the labour market, gaining experience and building a career.

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M.iur., M.oec., PhD student Intra Lūce, College of Law, Latvia, intra@jk.lv

Sergey Glushkov

Peculiarities of Teaching Medical Informatics and Statistics

Abstract

The article reviews features of teaching Medical Informatics and Statistics. The course is referred to the disciplines of Mathematical and Natural sciences. The course is provided in all the faculties of I. M. Sechenov First Moscow State Medical University. For students of Preventive Medicine Department the time frame allotted for studying the course is significantly larger than for similar course provided at other faculties. To improve the teaching methodology of the discipline an analysis of the curriculum has been carried out, attendance and students' performance statistics have been summarized. As a result, the main goals and objectives have been identified. Besides, general educational functions and the contribution to the solution of problems of education, students' upbringing and development have been revealed; two stages of teaching have been presented. Recommendations referred to the newest methodological development aimed at improving the quality of teaching the discipline are provided. The ways of improving the methods and organizational forms of education are outlined.

Keywords: education, Medical Informatics, Medical Statistics, information technology, methods and organizational forms of education

Introduction

The implementation of information technologies and statistical research techniques made it possible to conquer the existing contradictions between the amount of medical data and the possibility of its full-fledged analysis in modern medical science and in practice.

The current teaching practice of "Medical Informatics and Statistics" at universities shows that the majority of junior students start studying the discipline with no basic knowledge. The professional orientation of schoolchildren and those who study at specialized secondary educational establishments – future Medical schools students – doesn't include subsequent knowledge deepening: from basic-level to high-level teaching. This leads to lower students' performance, on the one hand, and shows the negative trend of misunderstanding and, as a result, inefficient use of information technology and statistical processing that is considered as a tool for scientific management of research results. These results are required by senior and graduate students or those students who study in residency.

Another methodological omission of Russian Medical schools is that there is no unified teaching program for the discipline, which, in its turn, is taught at different departments: biophysics, public health, information technology, and many others being a separate course. The fragmentation of the material leads to its dissolution in the content of other courses, little subject retention, non-participation in students' competence establishment concerning Medical Informatics.

Methodological framework of the course

The main aim of the subject is to develop a comprehensive vision of modern information technology and skills of using the most efficient and widely spread ones in practice. Another goal is to make students aware of the role of statistics in modern society, its influence on the current state and the development of science and technology, and the development and distribution of information technology.

Practical mastering of using efficient computer technology and special programs is a part of the course that teaches students to actively and productively use information technology in studying other disciplines.

Primary goals of the subject:

- to acquaint students with the main devices of a modern computer;
- to master practical skills of working with a PC;
- to master the skills of algorithmization and planning of problem solution;
- to create a vision of modern computer graphics and its implementation in various fields of human activity, to acquaint students with basic concepts and methods of using a certain pack of computer graphics in practice;
- to create a vision of modern integrated systems and their usage in various fields of human activity;
- to create a vision of information technology being a system of hardware and software tools and methods of using them;
- to clarify the role of information technology and the perspectives of its development for modern society.

The discipline “Medical Informatics and Statistics” provides students not only with the newest information processing toolkit, but also with a range of methods of using the toolkit in studying and analyzing the phenomena, objects and systems.

It is clear that the subject could not be studied separated from other disciplines. It must be adapted to the changes in the contents, teaching forms and methods of other disciplines. These changes are required to reflect the influence of information technologies on modern science, technology and all spheres of social life.

The content of the discipline includes a complex of interconnected components: theoretical and practical (Gerasimov, 2008).

Theoretical part of the course is aimed at developing the skills of analyzing objective problems and of algorithmic culture.

Practical aspect is devoted to acquiring the skills of working with the ready-made software. The need to develop the skills of dealing with an electronic computer includes significant increase in the amount of practice exercises (in comparison with other disciplines) in the overall structure of the course. This differentiates the discipline from the others.

It is essential to point out the main educational functions of the subject, its impact on the process of solving educational problems and of students’ upbringing and development.

The worldview function of the course. The function lies in clarifying the role of information processes (transfer, convert, store, etc.) for wildlife, technology, society; the importance of informatics and computing technology for the improvement of production efficiency, the change in the nature of work. One should admit that this function is not yet sufficiently implemented.

The educational function of the discipline deals with the issue of developing the skills of using computing equipment as a special tool of reaching educational objectives.

Dividing the aims into two large groups, referred to the development of the discipline and acquainting students with the basics of Informatics as a fundamental science, leads to a *two-staged* teaching structure.

The first stage is devoted to mastering the applications of Informatics and Statistics and is aimed at reaching a certain level that allows the subsequent wide use of obtained knowledge and skills.

The second stage is devoted to studying the basics of Informatics and Statistics as a fundamental branch of science and is foremost connected with shaping students' scientific worldview.

Improvement of methods and organizational forms of teaching

Talking about the improvement of methods and organizational forms of teaching, the key objective is to bridge the gap between theoretical and practical aspects of the course.

The most important issue is the one connected with choosing organizational forms of running the classes. Analyzing the nature of activities of those who are engaged in Informatics shows that a collective type of activity dominates here. Considering that it is important not only to give students certain knowledge and competencies but also some teamwork skills, such forms of teaching like seminars, workshops and debates should be widely used. Besides, collective activities like preparing an abstract, a report, carrying out a modeling experiment, preparing materials for other disciplines and others should be implemented. These forms can provide better subject retention, development of students' autonomy and willingness of being more active.

However, one shouldn't treat computer literacy only as the interaction with a computer on different levels. The key aim of the course is to develop the students' structural way of thinking. Therefore, a significant problem here lies in analyzing the relations between the course of Informatics and other disciplines of the program and, thus, in identifying the spheres of its application.

It is essential to develop *additions and clarifications* for the curricula of almost all the disciplines taking into account the potential of modern information technology and its development perspectives.

The education should be based on the *skills of finding* the necessary data and *working* with various databases, most notably with the ones in the Internet. This will help to avoid memorizing extensive, but later unnecessary knowledge (Glushkov et al., 2015).

A computer should be treated as a *learning tool*, but not as a subject of learning.

Teaching Informatics and Computing technology at universities

Considering the experience, it is recommended to study Informatics and Computing technology at universities in the following way:

- start from computer drawing, mastering the basic graphics software;

- learn the simplest tools of working with texts, master text editing software and the basics of text layout;
- master transforming the office software into a single process (texts, graphics and spreadsheets);
- study the basics of telecommunication technology (working with the local network, Internet);
- study the basics of algorithmization and programming in a modern high-level language.

Therefore, in the future it is necessary to pay more attention to using computer technology in practice and improving the intellectual level of students while studying the Informatics and Computing technology.

Studying mathematical statistics is based on using certain knowledge of mathematics as well as the following toolkit: Microsoft Excel, SPSS (PASW), and etc. Thus, there is no doubt that lack of study hours devoted to this particular discipline at universities leads to significant problems. Students' answers, such as "I do not know why this is necessary", show that they have no motivation to study the course during the first semester, this is particularly true in the case of mathematical statistics (Gerasimov, 2007).

The probability theory and mathematical statistics – is an obligatory subject that is included in the educational standards of the new generation for technical and humanitarian specializations. The discipline occupies a unique position among other branches of natural science. Its importance and relevance are reflected not only in skilled use of theoretical and probabilistic methods and ideas in professional field. It is also reflected in wide impact on the cognitive area: from establishing a modern way of thinking to thorough understanding of complex systems and modern conceptual vision of the world.

During the process of education it is important to pay certain attention to the inter-subject relations, in particular, between mathematical statistics and the Faculty of Preventive Medicine, Medicine and Pediatrics, where the knowledge of mathematics plays a significant role.

Underestimation of the role of this discipline by students may be connected with the fact that for junior students the role of mathematics and mathematical statistics in medicine is not obvious. Junior students are not interested in learning the material as they don't understand that it helps them to model, analyze and reach the professional goals.

Despite the increasing number of students the rate of their attendance decreases and now reaches 15%. Looking at elective courses the parameter equals 75% at the fourth year and lowers among sixth-year students. At the same time the number of students who do not attend extra classes rises.

These knowledge gaps hinder the teaching process, lower the motivation of getting new knowledge. Professors have to be patient and use their experience to regain the balance of students' knowledge as soon as possible by closing the existing gaps. One of the ways out is to develop special websites and electronic versions of textbooks and manuals.

By all means, that is not a question of total refusal of manual computing. It is more efficient to start using information technology after learning the basics of traditional ways of calculating. This greatly facilitates and speeds up the process of

computing, giving an opportunity to carry out much more complicated calculating later on that is connected with future occupational activities of the students.

Conclusion

The “Medical Informatics and Statistics” discipline is one of the core and relevant subjects for students who choose a medical profession. It will help the future doctors to feel at ease in the world of constantly developing information technology, medical data systems and statistical analysis of clinical data.

While studying the course particular attention should be paid to the methods of computer data processing, to forming databases and knowledge-bases, using Internet-resources, to the implementation of computer technologies in practice, that lead to the increase in intellectual knowledge of the students.

To improve the quality of education in the field of modern information technology in medicine it is necessary to develop a strategy of teaching students of different educational levels based on succession. This program will be implemented within the Resource-center called “Sechenov Medical Preparatory Department”. Moreover, it is important to use the practice of elective courses, broaden the outlook of the students with the help of conferences on medical informatics.

Constant monitoring and improvement of logistic support should be provided.

Moreover, it is essential to carry out close cooperation with employers as a young specialist’s performance will be significantly higher in case his/her future workplace is provided with high-level technical equipment.

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Assoc. Prof. Dr. Sergey Glushkov, I. M. Sechenov First Moscow State Medical University, Moscow, Russian Federation, svgl-1521@mail.ru

Irina Bobyleva & Olga Zavodilkina

The Role of Social Practice for the Development of Educational and Professional Standards

Abstract

The article describes modern development in education in the Russian Federation, tied to the development of professional standards. We will show that introduction of professional standards can not only start from a profession, but from an actively developing social practice. Using the example of alumni socio-educational support of all forms of care for orphans, (children left without parental care or in group homes), we will characterize a progression from the need in training such specialists to the formation of an educational environment. Peculiarities of the educational environment for specialists supporting alumni will be revealed, including the programs for professional training.

Keywords: professional standard, educational standard, alumni support, alumni support specialist, graduates from organizations for orphans and group homes

Introduction

Education is a necessary condition for systematic changes in every sphere of the life activity of a state. In the Russian Federation, a set of strategic tasks aimed at the development of education has been formed and is being implemented. The forecast of long-term socio-economic development of the Russian Federation for the period until 2030, developed by the Ministry of Economic Development of the Russian Federation, provides a need to form a flexible and diversified vocational education system (Order of the Government of the Russian Federation, 2014). The need for such a system is connected with the requirements of the labor market and the needs of an innovative economy.

One of the strategic objectives of the development of education in the Russian Federation is to bring educational standards in line with professional standards. Federal Law “On Education in the Russian Federation” (2015), establishes a rule to formulate requirements for the results of mastering professional competencies based on the provisions of relevant professional standards (Federal Law “On Education in the Russian Federation”). At present, there is a gap between the requirements on the part of the production, and those competencies that employees acquire in a vocational education system. Also, this does not ensure the timely translation of the qualification requirements in the education system. The existence of an agreed chain of “practice – a professional standard – an educational standard” will improve the quality of vocational education.

Introduction into the system of professional standards

A professional standard is a characteristic of qualifications an employee requires to carry out a certain type of professional activity. The qualifications of an employee

include the level of knowledge, proficiency, professional skills, and work experience of an employee (The Labor Code of the Russian Federation, 2001).

The topic of professional standards in Russia was introduced in Russia for the first time in 1997, when this term was officially used in the Program of Social Reforms in the Russian Federation for the period of 1996-2000 (Decree of the Government of the Russian Federation, 1997). Currently, more than 850 professional standards have been approved.

The professional standard contains requirements stating what an employee should know and can do in a certain area. It is based on the analysis of work activity; basically, on what a real specialist should know for the position he/she occupies in an enterprise of a particular industry.

The standard defines the type of activity, generalized labor functions, establishes for them a qualification level, labor functions and actions, requirements for knowledge and skills, education and work experience.

The development of professional standards involves a wide range of specialists and experts. The introduction of professional standards makes it possible to take into consideration demanded practices and moves away from the general level of preparation for core business. For example, in the social sphere – to a narrow specialization of work with different categories of the population. In addition, a professional standard, an independent qualification assessment aims at selecting an additional training program for an extended education.

The influence of the practice of social and pedagogical support on the content of professional and educational standards

The development of a professional standard could be done not only for an existing profession, but for the actively developing social practice. Thus, there was originally formed an internal tutoring. Later, domestic activity standard was formed on its basis. In turn, educational programs for the preparation of tutors were developed based on this standard. At present, the standard of tutoring has ceased to be internal and is part of the state professional standard of a specialist in the field of education.

The practice of social and pedagogical support is following a similar path. It began to develop actively in the national social pedagogy and social work since the 1990s.

Currently, the accompaniment is not an independent professional activity, but is an integral part of the activities of specialists in different professions: teachers, psychologists, social workers, etc. (Bobyleva & Zavodilkina, 2015).

Let us look at how support is currently presented in professional and educational standards.

The term “escort” is more often found in professional standards at the level of labor actions, reflecting the process of interaction of an employee with an object of labor, in which a certain task is achieved.

The specialist of the guardianship and trusteeship agency for minors accompanies families who took a child (children) for upbringing, interacts with various organizations, prepares materials for concluding and terminating contracts for accompanying families who accepted a child (children) for upbringing.

A teacher-psychologist (psychologist in the field of education) accompanies the implementation of programs for psychological correction of behavior and violations in the development of students.

The teacher of vocational training, vocational education and additional vocational education shall support the process and results of research, design and other activities of students under the higher education programs and (or) additional and assistant trainees; the work of graduate students (adjuncts) at all stages of the research.

The social worker accompanies a client to different organizations: trade, utilities, transport, communications, health, providing public services.

A specialist for rehabilitation work in the social sphere organizes maintenance and support of a rehabilitant at the end of the rehabilitation case. He also develops recommendations for handling the rehabilitant after completion of the rehabilitation of the individual route, and evaluates the resources of different services for the territory of residence of the customer organization of its support.

A psychologist in the social sphere develops a program of psychological support for individual clients, including the use of resources from various sources.

A specialist who works with families organizes support to the families, including replacement families; develops recommendations for supporting different types of families; and individual programs of support to different types of families with children.

A social worker organizes the provision of services for social support of citizens.

To carry out labor activities related to accompanying families, professional standards have distinguished necessary knowledge (the main approaches and trends in the field of support, principles of professional support, aims and objectives for support activities, peculiarities of organizing support, including the specifics of the particular high-risk groups, tracking methods) and skills (interacting with various experts and organizations, applying methods and technology support and help, organizing support, developing and implementing a program of support, and providing support).

At the same time, analysis of the federal state educational standards of higher education, currently in force, showed that support as a form of professional activity, which prepares graduates who have mastered the undergraduate programs and graduate specialties, practically does not occur.

The exceptions are areas of higher education programs for the preparation of “Special (defectological) Education” and “Psycho-Pedagogical Education”.

Graduates who have mastered the undergraduate training program, “Special (defectological) Education” are being prepared for the implementation of psycho-pedagogical support of socialization processes and professional self-determination of persons with disabilities. They should have: readiness to implement psychological and pedagogical support of the educational process, socialization and professional self-determination of students with disabilities, readiness for psychological and pedagogical support of families of people with disabilities, and interaction with those involved.

Graduates of Master’s in this area of training must be able to design and implement models of psychological and pedagogical support learning processes,

socialization and professional self-determination of persons with disabilities, as well as the design of individual routes of development, education, social adaptation and integration of persons with disabilities, based on the results of psycho-pedagogical study.

A bachelor in the field of training, “Psychological-Pedagogical Education”, has to be prepared for the following types of professional activities: a psychological and pedagogical support in pre-school, school, special and professional education; psychological and pedagogical support of children with disabilities in special and inclusive education.

The program of higher education, bachelor degree in the field of “Social Work” does not provide support as a kind of professional activity for its graduates, but focuses them on providing services and assessing their quality.

Thus, there is a discrepancy between basic professional training programs and requirements of professional standards.

At the same time, there is a group of specialists in social practice, for whom support is the main working function. An example of this is an expert, who accompanies graduates of children's homes and foster families during their adaptation to independent living.

The need for social adaptation of orphans, children left without parental care, and individuals like these, mentioned above, at the end of their stay in the organization for orphans and foster families, is due not only to a change in the social environment for them, but also by the following factors:

- the level of social maturity of graduates does not correspond to the full extent of the civil capacity that came into existence at the age of 18: the graduate is not a child anymore, but has not yet become an adult;
- the age-related tasks of upbringing and socialization, including the insufficient level of graduates' readiness for independent living and the readiness to adapt in new living conditions are not solved by the time of graduation from orphanages.

Given the limited capacity of graduates to adapt to changes on their own, related, *inter alia*, to the lack of family support, the state undertakes to facilitate their social adaptation.

State order to support graduates is formulated in three main strategic documents that define the state policy in the field of child and family protection: The National Strategy for Children for 2012-2017 (approved in 2012), The Concept of State Family Policy in the Russian Federation for the period until 2025 (approved in 2014), The Strategy for the Development of Upbringing in the Russian Federation for the period up to 2025 (approved in 2015).

However, specialists, for whom the accompaniment of orphans, children left without parental care, and graduates from orphanages, is their professional activity (support specialists), do not prepare educational institutions for professional education, and there is no professional standard for them. These factors make it necessary to create a system of additional professional education for support specialists.

Developing training programs based on practice and professional standards

Professional standards form the basis of a national framework for qualifications, which ensures the equality of all forms of lifelong learning. Actively developing social practice puts forward the requirements for the preparation of specialists necessary for its implementation. The need for specialists is mainly solved through professional development programs, purposefully bringing the competencies of specialists in line with the requirements of the ongoing activities.

Activities of a support specialist aimed at facilitating the adaptation of graduates:

- in a new educational institution obtaining vocational education;
- to conditions of full self-service, self-maintenance and self-organization;
- to having an unlimited amount of unsupervised free time;
- to expanding the network of social contacts, including blood relatives;
- to apply for a job for the first time at an organization;
- at a new place of residency when a new housing provided from the special stock or returning to previously occupied housing;
- to a family life.

Qualifications support specialist should enable him/her to cope with the tasks: reliance on the standard of a support specialist's activity allows development of a training program, which is aimed at mastering a new professional position, and new professional competencies that meet the requirements of the activity of accompanying graduates.

An effective training program is based on support specialists:

- considering innovations in pedagogical practice in post-institutional support: interdepartmental interaction and continuity, use of graduate activity and mobilization of its resources, a differentiated approach to support and individual character of its structure, a team approach to social and pedagogical support of graduates (a unified documentation, interdepartmental concilium), use the social environment of the graduate (online meetings, group conferences);
- a performance approach that allows listeners in the learning process to test a variety of technologies and techniques, to correlate them with the specifics of their professional activity and to introduce them into practice;
- a resource approach, involving attention to own resources and potential opportunities for students.

At the Institute of the Study of Childhood, Family and Education of Russian Academy of Education, a program of additional professional education (higher qualifications) "Supporting Graduates of Boarding Institutions and Substitute Families" was developed based on joint work with the charitable fund for social assistance to children "Spread the Wings!", implementing public projects aimed at the development of regional systems of graduates' support (Bobyleva & Zavodilkina, 2016).

The aim of the program: improvement of professional qualification of specialists engaged in social and pedagogical support of graduates of boarding institutions and foster families.

Specifics of the program:

- reliance on new professional standards;
- inclusion in the objective group of specialists from different professional fields: guardians and the board of trustees, educational organizations and organizations who provide social protection to the people;
- content, ensuring a qualitative change competencies;
- assessment tools that allow to make a conclusion about the changes that have taken place;
- practical orientation;
- prevalence (two-thirds of the study time) of interactive types of training sessions (workshop, master class, training, seminar, role-playing game, business game, etc.);
- independence of thematic modules, which can be used as independent educational programs, considering the contingent of students;
- a compound of remote and full-time study;
- the possibility of learning according to an individual curriculum;
- an approbation during pilot work aimed at the development of regional escort systems in several regions of the Russian Federation.

The content of the program addresses the following issues:

- support as an activity to manage changes in the life situation of the graduate;
- peculiarities of social adaptation of a graduate in the post-boarding school period;
- collection and analysis of data on the life situation of the graduate;
- professionally significant qualities of a support specialist;
- technology, methods, tools, expert support.

The program of professional development becomes the core of the educational space, by which we mean “the place of the educational movement of a person” (Tsuker, 2004). It not only packs educational material, but also cements the entire educational environment (Popov, 2017).

A necessary component of the educational space for support specialists is the methodological support of their activities in various forms of training: interregional workshop, communication training, supervision, workshop, pedagogical lounge, psychological-pedagogical workshop, case-method, individual and group consultations, webinars, round tables, conferences.

Conclusion

The practice of the last decade shows that the management of the quality of educational programs is inextricably linked with professional standards, which are the basis for the formation of criteria for assessing quality, both qualifications and educational programs.

In the Russian Federation, the introduction of a system of professional standards determines the current direction of the development of education. Timely transition of qualification requirements into the education system increases its quality.

Actively developing social practice influences professional and educational standards. Thus, the job of social and pedagogical support has become part of job

descriptions for the following: teachers, psychologists, social workers. The term “support” finds a reflection in professional and educational standards.

For specialists accompanying graduates from orphanages and graduates of foster families, support becomes the main labor function. In the absence of professional and educational standards, the need for the formation of a system with additional vocational education for graduate support specialists is escalated.

In the regions of the Russian Federation, innovative programs of professional development appear, aimed at tying professional competence with requirements for professional activities of social and pedagogical support of graduates. These programs become the core of the educational environment. The content and organization consider the needs of support specialists, motivating them and reflecting their life perspective. The educational environment provides many individual forms of development and a variety of educational opportunities.

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Assoc. Prof. Dr. Irina Bobyleva, Charity Fund of Social Assistance to Children “Spread your Wings!”, Institute of Study of Childhood, Family and Education of the Russian Academy of Education, Moscow, Russian Federation, bobyleva_ia@rambler.ru

Olga Zavodilkina, Charity Fund of Social Assistance to Children “Spread your Wings”, Institute of Study of Childhood, Family and Education of the Russian Academy of Education, Russian Federation, kolega212@yandex.ru

Part 8

Key Directions and Characteristics of Research Organization in the Contemporary World

Galina Zashchitina & Natalia Moysyak

Some Aspects of Developing Background Knowledge in Second Language Acquisition Revisited

Abstract

The article focuses on defining how background knowledge impacts on second-language acquisition by giving a brief overview of schema theory, the interaction of the basic modes of information processing. A challenge of dealing with culturally specific texts in second language acquisition is also touched upon. Different research-supported views on co-dependence of culture and meaning in learning a language as well as the significance of integrating authentic use of literature into the learning process are also briefly examined. The article stresses that a lack of prior and cultural knowledge may become a put-off factor for a second language student thus hindering the entire process of learning as failing to understand and master the target culture prevents a student from mastering a second language. The article also briefly considers cultural interference at the affective and denotative levels to show the connection between culture and language.

Keywords: background knowledge, reading strategies, prior knowledge, cultural knowledge, reading comprehension

Introduction

Many second language learners find it difficult to understand a spoken or written text in the foreign language especially when one is in the earliest stages of language study. Culturally specific texts may require more background knowledge. Those learners who lack sufficient background knowledge or are unable to activate this knowledge may fail to understand the key concepts and grasp the message of the text. High prior knowledge of a subject area or key vocabulary of a text often means higher scores on reading comprehension.

Moreover, second language student learn more effectively when they already know something about a content area and when concepts in that area are familiar to them; they learn and remember new information best when it is linked to relevant background knowledge.

A common thread running through various perspectives on language acquisition is the view that the meaningfulness and familiarity of second language material plays a crucial role as learners begin to develop their second language skills.

Beginning in the 1960s, the role of meaningfulness and organization of background knowledge was particularly emphasized by cognitive psychologists. Educators such as Ausubel (1968) believed that learning must be meaningful to be effective and permanent for material to be meaningful, it must be clearly relatable to existing knowledge that the learner already possesses. Furthermore, this existing knowledge base must be organized in such a way that the new information is easily assimilated, or “attached”, to the learner’s cognitive structure. Ausubel stressed that teachers need to provide “advanced organizers” – devices that activate relevant background knowledge – to facilitate the learning and retention of new material. Years after Ausubel first introduced this concept language teachers continue to recognize the value of such organizers in instruction Hadley (1993) and Carrell (1987) stress that with regard to the EFL/ESL learning contexts, “some students’ apparent reading problems may be problems of insufficient background knowledge”. In his turn, Sami A. Al-wossabi (2014) claims that failure to understand particular linguistic terms demotivate learners and cause them to act passively in most of their language classes. They feel disappointed particularly if the learning material exceeds by far their background knowledge and their ability to understand the overall meaning of texts. It is considered vital to teach students how to use their background knowledge as a reading strategy.

Results and discussion

As Brandao and Oakhill state (Brandao & Oakhill, 2005) prior knowledge, also termed word knowledge or background knowledge, is what a person knows about the content of the text. The term schema also relates to the term prior knowledge because a person’s schema is what already is already known about the world (Gregory & Cahill, 2010). Readers are expected to convey their knowledge in order to fill holes within the text to construct an understanding of the text.

How does background knowledge impact specifically on second-language acquisition? It might first be helpful to think about the kinds of knowledge learners can bring to comprehension tasks. In the second-language comprehension process, at least three types of background knowledge are potentially activated:

- 1) linguistic information, or one’s knowledge of the target language code;
- 2) knowledge of the world, including one’s store of concepts and expectations based on prior experience;
- 3) knowledge of discourse structure, or the understanding of how various kinds or types of discourse (such as conversation, radio broadcast, literary texts, political speeches, newspaper and magazine stories, and the like) are generally organized.

When language practice is limited to the manipulation or processing of linguistic form, only the first type of background knowledge is involved. By contrast, language learning activities that provide relevant context should be helpful in activating student’s knowledge of the world and of familiar discourse structure.

One might hypothesize that the need for activating knowledge beyond that of the linguistic code is greatest for learners at low levels of proficiency, whose imperfect control of the language can be a serious hindrance to comprehension.

This hypothesis is supported by research done by Yorio (1971), who yet concludes that second language readers and listeners are at a disadvantage as they are forced into recalling cues that they either do not know at all or know imperfectly

and consequently language learners are more likely to forget those cues much faster than they would cues in their native language. Besides necessity to simultaneously predict future cues and make associations with past cues can become challenging for many second language inexperienced learners.

Students at lower levels often try to process language in a “word-for-word” fashion, drawing only on one kind of background knowledge – their imperfect knowledge of the target-language code. If such students can be encouraged to use other cues to meanings, such as their knowledge of the world and of discourse structure, the process of understanding should be facilitated. Teachers can help students in this process by providing supplementary cues to meaning, drawing on all three types of background knowledge.

The view that individuals utilize various types of background knowledge when attempting to comprehend written and oral texts was proposed by reading theorists writing in the 1970s, such as Smith (1971) and Goodman (1972). Smith maintains that efficient readers process selected elements of the text rather than use all the visual cues available on the printed page. He describes the process of comprehension as the “reduction of uncertainty”. Goodman (1972) suggests that reading is a “psycholinguistic guessing game”, involving the interaction between thought and language. He argues that “the ability to anticipate what has not yet been heard is vital in listening”. Both Smith and Goodman describe “top-down” models of reading comprehension, where the reader is thought to begin with high-order concepts (such as one’s general knowledge of a topic or situation) and work down to the actual features of the text (such as words, phrases, morphology, syntax and rhetorical structure). In their view, readers sample the textual cues, make use of redundancies, and formulate their hypotheses about what the text is going to say, actively using background knowledge to make appropriate predictions about the ongoing discourse. The sampling process also serves to help readers confirm or reject their hypotheses as they process the information in the text.

When it comes to the range of pre-reading activities that are in store for the learners the teacher can resort to either pre questions to be answered after reading the text; pre questions to activate the reader’s knowledge about the topic; content organizers (summaries) much favoured by Tudor (1989) or predictions based on the title, subheadings, illustrations, or skim reading of the text; and integrated reading preparation (combining the above) regarded as far more effective by Taglieber et al. (1988).

Fries (1963) was among the first to incorporate cultural background information into a description of meaning. In his analysis, there are three levels of meaning: lexical, grammatical, and social-cultural. Comprehension of the total meaning of a sentence occurs only when the linguistic meaning of the sentence is filled into ‘a social framework of organized information’. He illustrates the importance of the social-cultural level with a passage from Washington Irving. The response to Rip Van Winkle’s ‘archaic’ use of term ‘Tory’ after an absence of twenty years can be attributed to the fact that its cultural meaning had changed from ‘good citizen’ to ‘enemy of the new government’. Fries (1945) argues that readers have missed the meaning of the story if they do not understand the reaction of the group to Rip’s word. For mastery of a foreign language, he argues that the person should find substitute for the kind of background knowledge existing in his/her own language

(Fries, 1945). While these insights have influenced subsequent pedagogical writings directed to foreign language and EFL pedagogy, the position Fries advanced has been somewhat attenuated (Steffensen & Joag-Dev, 1996).

One position that has been adopted is that there will be cultural interference at the affected level, in the connotative values of words and the attitudes expressed in, and underlying, the passage. Thus, Wilga M. Rivers (1983) identifies differences in values and attitudes as one of the main sources of problems in a foreign language and one area in which significant progress can be made in understanding a foreign culture as any authentic use of literature will introduce cultural concomitants into the classroom, a point supported by cross-cultural research. Rivers and Temperley (1978) argued that social-cultural meaning was an affected dimension and a great deal of reading performance is attributed to knowledge of vocabulary. Vocabulary knowledge is also believed to be developmental and related to background knowledge, teachers need to broaden their students' word knowledge in order to better comprehend texts (Rupley & Slough, 2010).

A second approach is that there will be interference at the denotative level as well, and students must have a rather complete understanding of the background information if there is to be complete comprehension of a text. Thus the meaning of the notice put up on a London barber shop "Sorry, no Boris cuts here" will be difficult to catch on for those learners of English as a second language who lack knowledge of what the current British Foreign Secretary used to be, as well as of Boris Johnson's trademark 'shaggy' cut and the kind of figure he cuts with British public. To fully decode the notice and enjoy the humour behind it learners should definitely do some research into the subject or seek their teacher's assistance in helping them to do that. The teacher is to provide the background information, including description of his/ her own experience in the target culture concerning the given case. Thus, Paulston and Bruder (1976) have a point when, following Goodman's thesis that the proficient reader must draw on his/her experiential conceptual background in order to supply a semantic component to the message, they conclude that learning to read is easier 'when the cultural background is familiar and students can draw on cultural information in the decoding process'. Robinett (1979) takes a similar position on reading as he focuses on the students' understanding of the cultural content implicitly or explicitly expressed, and their ability to cope with the grammatical structures in the passage. The stated position is close to that advocated by Fries but generally is not as rigorously stated.

A third approach recognizes that complete mystery of a language is dependent upon knowledge of the culture but recommends the use of literature to achieve this goal. Marquard (1967, 1969) views literature as a vehicle for creating cross-cultural empathy and appears to assume that at a certain point in their development students will possess the reading skills necessary for processing a passage, regardless of its content. He also stresses that many practitioners use foreign literature or simplified reading material based on the target culture in their classroom to enable the reader to experience how people of a particular culture live (Steffensen & Joag-Dev, 1996, p. 50).

We entirely agree with a statement that culture, as an ingrained set of behavior and modes of perception, becomes highly important in the learning of a second language, a language is a part of culture and a culture is a part of a language and the

acquisition of a second language is also the acquisition of a second culture (Johnson, 1995, p. 123).

The study of another language enables students to understand a different culture on its own terms. The exquisite connections between the culture that is lived and the language that is spoken can only be realized by those who possess knowledge of both. So as the language is the primary vehicle for expressing cultural perspectives and participating in social practices, the study of a language provides opportunities for students to develop insights in a culture that are available in no other way. A thought that the true content of the foreign language course is not the grammar and the vocabulary of the language, but the cultures expressed through that language (Standards for Foreign Language Learning, 1996, pp. 40-47) still holds true. Thus teachers should use culturally relevant and authentic texts that give an insight into the target culture and help second language learners not only acquire the second language but also the second culture.

Conclusion

There is a well-established correlation between background knowledge and comprehension. "In the top-down view of second language reading, not only is the reader an active participant in the reading process, making predictions and processing information, but everything in the reader's prior experience or background knowledge plays a potential role in the process" (Carrell, 1987, p. 149).

The use of background knowledge activation strategies in the second language teaching is widely supported. These strategies focus on building up and activating background knowledge; helping the learners to connect new information about the world with what they already know. Further, activities enhancing background knowledge can help the learners to see how to make use of and apply information in different situations. Various activities enhancing background knowledge should go on in second language reading classes. Research studies stress the importance of prereading activities, such as discussing of a story, providing background information, explaining lexical items etc., in order to help learners develop and activate background knowledge that is relevant to their reading materials.

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Assoc. Prof. Dr. Galina Zashchitina, Moscow State Linguistic University, Moscow, Russia, galina.zashchitina@gmail.com

Senior Lecturer Natalia Moysyak, Moscow State Linguistic University, Moscow, Russia, nataly-m@mail.ru

Lyudmila Dyshaeva

On the Theoretical and Practical Consistency of Neoclassicism as a Theoretical Platform of Economic Disciplines

Abstract

The article discusses the scientific and practical validity of the neoclassical theory, which forms the basis of training courses in economic theory and institutional economics in accordance with the current Educational Standards of the Russian Federation. Critical analysis of the “supply economy” theory that emerged in line with neoclassicism as well as of the new institutional theory that absorbed practically all of neoclassical methodological principles is given. Neo-institutional interpretations of the basic economic categories are considered.

Keywords: neoclassicism, theory of “supply economy”, neo-institutionalism, scientific and practical consistency, property, ideological mission

Introduction

At present, there is no doubt that it is necessary to form and build up the nation’s intellectual potential for the implementation of innovative development option. Essential and significant for this process is to ensure the proper quality of economic education.

Unfortunately, over the years of reforming, the level of training of economic personnel has decreased in the Russian Federation, which is noted in a number of publications, whose authors state the general weakness of intellectual and qualification training of company employees (Blinov & Rudakova, 2013; Daskovsky & Kiselev, 2013).

In domestic educational literature on economic theory prevail interpretations within neoclassical direction, and therefore it is appropriate to cite the estimates of scientific and practical justifiability of neoclassicism as a theoretical platform for training courses and economic policy by well-known foreign economists, public figures and economic organizations.

In one of the latest reports of the National Bureau of Economic Research (USA) on the program “The Role of Economic Policy in Macroeconomic Theory” it is noted that empirical studies of the late 1990s using the macroeconomic data of industrialized countries raised serious doubts about the ability of neoclassical growth models to give a satisfactory explanation for aggregate fluctuations in the economy (Schmitt-Grohe & Uribe, 2005).

In October 2010 the cinemas of New York started demonstrating a documentary film by the famous American film director Charles Ferguson on the role of economists-administrators and economists-scientists in shaping the preconditions of the economic crisis that shocked the US and the world. The author of the film interviews the leading figures of the economic block in the US government, famous

US economists, visits various countries suffering from the crisis, and comes to the conclusion that both the official system and the initial theoretical constructions are vicious (The New York Times, 2010).

Criticizing neoclassical theory on the whole as a dominant part of the post-war mainstream, Douglass North in his Nobel lecture (December 9, 1993) claimed that this theory is an inappropriate means for analyzing policies and making recommendations that stimulate economic growth and development (World economic thought. Through the prism of centuries, 2004a, pp. 707-708).

Results and discussion

The abovementioned authoritative critical remarks on the neoclassical theory would be continued as follows.

In the second half of the XX century, the theory of “supply economy” was introduced in the neoclassical direction; its authors were American economists. Not being a coherent scientific concept, the theory of “supply economy” is a set of recommendations in the field of economic policy, namely, it suggests reducing the tax burden of organizations and state budget expenditures (improving the budget), and privatizing state enterprises.

The list of measures is painfully familiar: these very measures were implemented by the reformation Government of the Russian Federation in the 90s of the 20th century and continue to be embodied into Russia’s economic policy at present.

In fairness, it should be noted that this theory was put into the basis of the economic policies of R. Reagan (USA) and M. Thatcher (Great Britain) in the 80s of the 20th century, but after that these countries moved rather quickly to a more flexible and efficient economic policy.

In fact, general recommendation to reduce the tax burden is a too abstract approach. It is known that really competent and effective tax policy provides different tax rates and methods of their construction for different types of tax payments. In addition, tax rates are also differentiated depending on the categories of taxpayers, the branch belonging of economic entities in order to equalize the profitability of economic activities in different sectors of national economy, or, conversely, its differentiation, taking into account the goals and priorities of current and prospective economic policy of the state. It is demonstrated by the economic practice of any modern developed country, including the USA. Reduction of the state budget expenditures recommended by the theory of “supply economy” runs counter to the budgetary policy of modern developed, for example, European countries, where the state’s consistently high budgetary expenditures do not turn into a stopper, as the theory in question suggests, but a generator of economic growth.

There are many eloquent publications about destructive consequences of mass privatization for national economies of the former union republics that was held on the post-Soviet territory (Kulikov, p. 4). Therefore, the abovementioned estimates by leading Western economists about scientific and practical inconsistency of neoclassical theory seem natural.

However, it is no coincidence that modern American economist R. Heilbroner, an honorary professor of economics at the New School of Social Research in New York, meaning by modern economics, in fact, a neoclassical direction (as

understood from the context – author) points at the distraction from the analysis of the system of production relations as its significant defect:

It is not surprising that the scientific school, considering the economic system in isolation from these motives (from the analysis of production relations-the author), raises the theory of choice (in the situation of limited resources – the author) to the commanding height and proclaims the desire for the general equilibrium by its immanent tendency. It is here that the economy discovers its fatal infirmity as a pretender to universal science and its fraud as an imperial doctrine. (World economic thought. Through the prism of centuries, 2004b, pp. 400-401)

Thanks to the efforts of modern American economists, many of whom have become Nobel laureates in the last 10 years, a new direction of economic science – neo-institutionalism – appeared by the end of the last century.

As it is noted in the article by A. G. Hudokormov:

The latest trend of the world economic thought – neo-institutionalism – has gained universal recognition by the end of the last century and is gradually included as an integral part of the main core (mainstream) into the Western economic theory.

Neo-institutionalism has seriously changed the mainstream content by introducing fundamentally new categories into its composition: transaction costs, property rights, opportunistic behavior, contract network, etc. (Hudokormov, 2007, p. 58)

Quite recently the course “Institutional Economics”, outlining the ideas of neo-institutionalism, was introduced to Russian universities as a mandatory discipline for students of economic specialties. As it is claimed, neo-institutionalism is a kind of symbiosis between neoclassical theory and American classical institutionalism. “Neo-institutionalism, in its constructions, either explicitly or implicitly proceeds from the prerequisites characteristic for the neoclassical theory” (Agapova, 2009, p. 99).

Acquaintance with the main topics of the “Institutional Economics” left the following impression. In fact, when using new terminology, the basic postulates of neoclassicism are re-declared: adherence to the idea of economic freedom; minimal state participation in the economic life of the society; the principle of methodological individualism; consideration of the market as the best way to organize economic activity; rationality of economic behavior of individuals, however, not absolute, but limited.

It seems that fairy tales have more relevance to the modern economic reality than neo-institutional model of pure market economy with the completeness of information and zero transaction costs, optimal allocation of resources and maximum social welfare due to private property.

The rational link of the American classical institutionalism by T. Veblen, consonant with the position of the economists of German historical school – consideration of socioeconomic factors in unity and development for the objective and productive exposition of the laws and tendencies of social development – is largely lost in the new course. It is replaced by the texts, tentatively illuminating certain phenomena of society’s social and economic life.

It is striking, for example, to describe individuals’ labor behavior, for some reason peremptorily assuming opportunistic character, that is, unfair behavior, abuse of official position to the detriment of enterprise and collective’s interests.

Why should it be so humiliating for people and, in particular, for hired labor?

It would be interesting to know if the content of the course “Institutional Economics” identical in Russia and the US, for example? And what is thought about the description of labor behavior given in the Russian textbooks of “Institutional Economics”, for example, by the Japanese with their system of lifelong hiring and exemplary corporate culture?

It is also necessary to remember about the educational component of the educational process. If the representatives of academic science from the pages of textbooks authoritatively talk about the opportunistic behavior of company employees as a norm of economic behavior (rather than a deviation from the norm, which would be appropriate and understandable), then only a certain stereotype of thinking and behavior of the forming personality can be seen as its result.

Also alarming is the interpretation by neo-institutionalism theorists of the basic economic categories, for example, property.

In the implementation of the predominantly legal aspect of analysis in the theory of property rights “the questions studied are not so much about the origin of the institution of property... yet about comparative effectiveness of one or another type of property rights” (Agapova, 2009, p. 66). This affirms the immutable advantage of private property over other forms of ownership.

Considering private property as an ideal, the representatives of the neo-institutional theory see the justification (permissibility) of the existence of other types of property in the impossibility (due to high costs) to provide exclusive rights to the resources of some individuals, thus treating both state and common property as an inevitable evil. (Agapova, 2009, p. 98)

Further on, the author of this quotation gives an amazing, magnificent text explaining the actual place of different forms of ownership in the economic system:

The most important assumptions in protecting private property are that all the costs and benefits of decision-making are borne by the individual ... Obviously, it is not always followed in the real economy, therefore, the process of limiting private property, or restrictions on the abuse of private property, also receives a significant spread in the regime of private ownership. This may mean recognizing that the institution of private property does not provide economic and social optimum and needs limitations on the part of the state as a political institution. (Agapova, 2009, p. 87)

The critics of communal property completely ignore the fact that for a very long period the predominant form of people's interaction was joint activity, which corresponds to the institution of communal property...

The relations of communal and collective property being embodied in the institutions of use, possession and disposal of property as well as interpersonal relationships (including family and marriage), sprouted through all stages of person's life and determined his/her spiritual mood. And not indifference, but sympathetic attention to others, not individualism, but adaptation to the needs of the organization, not rivalry, but close and constant cooperation are the main characteristics that accompany communal (collective) property...

This property system, accompanied by the orientation of production to direct consumption, did not entail predatory use of resources. Paradoxically, this phenomenon is typical for the system of private property which is the basis of modern market economy...

It is generally accepted that modern organization of consumer demand leads to ultra-fast moral obsolescence of products. Speaking figuratively, the inevitable consequence of this process is the accelerated processing of initial resources into the streams of annoying things, becoming waste of life. (Agapova, 2009, pp. 94-95)

In the context of the discussed issue it is interesting to cite the so-called “Posner’s maxim”:

Legal rules should “imitate the market”, or, in other words, help to establish such distribution of property rights that the market would achieve in the absence of transaction costs and economic agents would reach themselves if not the positive costs of transactions. (Agapova, 2009, pp. 81-82)

What is it? Dreams of a “pocket” state that does not prevent legalization of real arrangement of economic power between oligarchic groups?

Further. The so-called “naïve” theory of the emergence of property rights suggested by neo-institutionalists is by no means naïve.

In arguments, the advantage of private ownership of resources is almost categorically affirmed, “elbow work” is approved for the purpose of priority capture of resources, “such characteristics of the individual as egoism and utilitarianism are presumed” (Agapova, 2009, p. 100), i.e. a certain stereotype of economic thinking and behavior is gradually being introduced into public consciousness.

The content and ideological implications of the reasoning on this issue once again testify about the unity of the initial positions of neoclassicism and neo-institutionalism.

Once again, it should be emphasized that in all theoretical constructions of the neo-institutional theory, the role of the state in the social and economic life of modern society is distorted and depreciated.

It seems, therefore, that in recent decades, in the works of modern neo-classicism and neo-institutionalism representatives who are predominantly American economists, there is no search for an abstract truth that has been cleared of ideological underpinnings (which was proclaimed at the time of the formation of neo-classical direction in the late 19th century), but on the contrary, they demonstrate a far-sighted ideological move aimed at replacing real scientific and economic knowledge as a basis for practical activity with far from reality pseudo-scientific schemes lobbying a certain set of statements that have some relation to individual socioeconomic phenomena of public life, but in no way are a well-composed economic concept that could serve a basis for the proposal of efficient social and economic state policy measures.

It can be assumed that both neoclassical theory and institutional economics (neo-institutionalism) are called upon fulfilling an important ideological mission: to form a certain type of economic thinking and behavior on the territories of the countries where this material will be accepted as the content of basic economic courses.

As A. G. Hudokormov rightly noted:

Leadership in the Nobel Prizes in economics, among other things, necessarily includes a moment of national and ideological influence... In essence, this is another manifestation of the soft power that alongside with the “forces” of a different kind determines the dominance of the United States in the modern world. (Hudokormov, 2007, p. 55)

Conclusion

It seems that modern domestic theoretical economic educational courses should be substantially reworked, cleared of pseudoscientific constructions distracting students from the scientifically sound and practice-oriented knowledge.

Recognizing the positive experience of developed countries and recent own experience of teaching quality economic theoretical knowledge, it is necessary to take the teaching of the classical school of political economy in its most scientific Marxist version, supplemented subsequently and further creatively developed by the outstanding representatives of Russian and Soviet economic science as a foundation for basic courses in economic theory.

When discussing the directions of the economic policy of the modern state useful and meaningful also seem the ideas expressed in the framework of German historical school on the development directions of the productive forces of the nation; American classical institutionalism of the early twentieth century; instruments of state regulation for socio-economic processes at the level of national economies; Keynesian economic theory in relation to substantiating the need and direction of state regulation at the present stage of society's socio-economic development; German ordoliberalism as a theoretical platform for economic policy of "social market economy" by L. Erhard.

Moreover, the listed theories and directions of economic thought do not look like theories that are alternative to Marxism, but are consistent with Marxist political economy, being the development of its separate provisions, namely, the question on the role and functions of the state in the evolution of the economic system.

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Assoc. Prof. Dr. Lyudmila Dyshaeva, Ural Institute of Management of the Russian Academy of National Economy and Public Administration, Yekaterinburg, Russia,
lyudmila.ekat@gmail.com

Anna Serebrennikova & Yekaterina Mashkova

Terrorism as a Social and Legal Phenomenon

Abstract

This article examines the concept of terrorism as a social and legal phenomenon, its international legal and criminal-legal characteristics. Highlighted are the main aspects of cooperation of the states and the international community to counter terrorist activities. Terrorism as a social phenomenon is determined by paragraph 1 of article 3 of the Federal law of 06.03.2006 No. 35-FZ “On combating terrorism” according to which terrorism is understood under the ideology of violence and practice of influence on decision-making by public authorities, local self-government bodies or international organizations connected with frightening the population and (or) other forms of unlawful violent actions. Thus, terrorism is a social phenomenon that has many criminal legal forms of manifestation – specific elements of terrorist crimes.

Keywords: terrorism, states, combating terrorism, international law, criminal law

Introduction

In modern realities, terrorism represents a complex social phenomenon, which has long ago become a threat to security throughout the world. This is primarily associated with the fact that criminal activities, understood as “terrorism”, are not only characterized by international public danger, but also have transnational parameters. The tendency toward increase in the frequency and scale of terrorist acts, beginning from the 2000-ies, has also been noted in the resolutions of the United Nations Security Council (UNSC).

At present, there is no universally recognized definition of the concepts of “terrorism” and “international terrorism”, at the same time, the legal ground for combining various criminal encroachments into the category of terrorist encroachments lies in the fact that they are directed against the foundations of public security as one of the main components of the international legal order.

Doctrinal approaches to the terrorism-related issues

The analysis of the doctrinal approaches to the terrorism-related issues shows that there is also a “negative” approach to the problem of elaboration of a universal definition of terrorism, according to which the existence of a definition of terrorism is not a mandatory condition for counteraction of this phenomenon (Antonyan, 1998; Naumov et al., 2016; Keshner, 2015). For example, W. Laqueur (1997) believes that the term, which is overloaded with the meaning by its nature, does not lend itself to the efforts to elaborate a comprehensive and objective definition of terrorism. Besides, it can also be assumed that with the fixation of the definition of terrorism, this can affect the practice of the counter-terrorism measures implemented by the states in the light of interpretation of this term solely as a discretion of each

state independently, which offers various opportunities both for the unintentional violations of human rights by the state, and for the conscious abuse of the use of this concept.

The potential of international sanctions in counteracting terrorism was first fully and most consistently used by the UN Security Council in Resolution 1267 (1999), in accordance with which all the member states must define the corresponding individuals and entities and recommend them to be included in the regime list by the UN Security Council, in addition, taking into consideration the global nature of the threat that terrorist activities bring to the international peace and security, all the states must become obligatory participants in the implementation of sanctions regime of all the states.

Indeed, the absence of a universally accepted understanding of terrorism has not currently become an insurmountable obstacle in the international counter-terrorism struggle. Of great importance for the characteristics of crimes of terrorist orientation is Resolution 1368 of the UN Security Council (2001), which contains a list of the activities, which are to be prevented and which require the application of punishment for the perpetration thereof. The Security Council also calls all the states to bring to justice the perpetrators, organizers and sponsors of the terrorist attacks on the territories of these states (Resolution 1368, 2001) and to criminalize the deliberate provision or collection (by any means – directly or indirectly) of funds with the intentions to finance terrorism (Resolution 1373, 2001). However, it should be noted that it is the international treaties (universal and regional treaties), cooperation of the states within the framework of international organizations (Council of Europe, LAS, OAU, SCO (The Convention of the Shanghai cooperation organization against terrorism, 2009)), international conferences and associations that are not based on the international treaties (G20, Non-Alignment Movement) should be considered as classical forms of cooperation of the states in the light of struggle against terrorism. The Russian Federation is a party to most of them.

The Russian legislator has taken the path of implementation of the assumed international legal obligations by adopting (International Convention against the taking of hostages, 1979; International Convention for the suppression of terrorist bombings, 1997; Convention against transnational organized crime, 2004) the corresponding domestic regulatory legal acts (Federal law № 115-FZ, 2002; Federal law of 25 July 2002 № 114-FZ, 2002; Resolution 1566, 2004; The concept of counterterrorism in the Russian Federation, 2009; The decree of the President of the Russian Federation № 6, 2001; The presidential decree № 286, 2011). However, introduction of the mentioned changes is an example of mechanical implementation of the provisions of the international treaties.

This assumption is based on the fact that, from the perspective of the contents of the provisions of the international treaties, the obligations for the implementation of which are assumed by the state, one can speak of the category of the international treaties, agreements and decisions, which establishes rules of conduct in a specific sphere; in this respect, the international legal norms do not, as a rule, explicitly establish the rights and obligations of the participants in direct legal relationship, or, although they prescribe the perpetration of specific actions, they do not regulate the procedure for the implementation of these actions. In this case, the mentioned category of the provisions of the treaties and decisions is implemented through the

actions of public authorities of the state, for example, in the form of implementation of rights and obligations, and in this case, it represents a form of concretization of the set of facts of origin of the corresponding rights and obligations.

Terrorism as a social phenomenon

All dangerous and negative social phenomena objectively exist in reality, regardless of whether they have received legal regulation in the criminal legislation. This is precisely why a negative social phenomenon is always a primary one with respect to the criminal legal forms of its manifestation, which only arise provided that the corresponding constituent elements of a crime are fixed in the text of the criminal law.

As a social phenomenon, terrorism is defined by paragraph 1 of Article 3 of the Federal Law dated 06.03.2006 No 35-FZ “On Counteraction of Terrorism” (2002), in accordance with which terrorism shall mean the ideology of violence and the practice of influence on the taking of a decision by government authorities, local self-government authorities or international organizations, associated with the intimidation of the population and (or) other forms of unlawful acts of violence.

Terrorism, as a social phenomenon, should be distinguished from its specific criminal legal forms of manifestation: the constituent elements of a crime, provided for by Article 205 (Act of Terrorism), 205.1 (Contributing to Terrorist Activity), Article 205.2 (Public Calls for Perpetration of Terrorist Activity or Public Justification of Terrorism), Article 205.3 (Training for the Implementation of Terrorist Activities), 205.4 (Organizing a Terrorist Community and Participation in Such), Article 205.5 (Organizing Activities for a Terrorist Organization).

Consequently, terrorism represents a social and legal phenomenon, which has a plurality of criminal legal forms of its manifestation – separate constituent elements of crimes of terrorist orientation.

Unfortunately, the Russian legislator sometimes identifies social phenomena with their criminal and legal forms of manifestation. In the Russian criminal law, criminal responsibility for terrorism was introduced with a certain delay, on the basis of the Federal Law dated July 1, 1994, in accordance with which Article 213.4 was included in the Criminal Code of the Russian Federation. In Article 213.4 of the Criminal Code of the Russian Federation, terrorism is defined as the perpetration of an explosion, arson or other actions intimidating the population, and creating the threat of human death, infliction of significant property damage or the onset of other grave consequences (terrorism) for the purpose of violation of public security or influence on the making of a decision by government authorities. However, Article 213.4 of the Criminal Code of the Russian Federation actually does give a definition of terrorism as a social phenomenon, but as one of the criminal and legal forms of its manifestation (act of terrorism).

It appears that with this approach, the legislator has groundlessly identified terrorism, as a social phenomenon, with one of the criminal and legal forms of its manifestation. In point of fact, terrorism, as a social phenomenon, is not exhausted by the activity, provided for in Article 205.

In the current version of the Criminal Code of the Russian Federation, criminal responsibility is provided for in Article 205 of the Criminal Code of the Russian

Federation not for terrorism, but for act of terrorism, that is, for a separate criminal and legal form of manifestation of terrorism.

In our opinion, the main task of the legislator in the field of counteraction of terrorism is to detect various objectively existing forms of manifestation of terrorism and fix the attributes of these forms in the criminal law. In this respect, in the process of this activity, the legislator must take into consideration the requirements of the legislative technique and the principle of systemacity.

Unfortunately, a large number of constituent elements of crimes of terrorist orientation have been formulated in the General Part of the Criminal Code of the Russian Federation with serious deviations from the principle of systemacity. Sometimes the deviations from the principle of systemacity are caused by mechanical implementation of the provisions of the international treaties in the national criminal law. Thus, for example, in the international treaties, complicity in crimes of terrorist orientation is considered as an independent form of terrorist activity.

The legislator must design separate constituent elements of the crimes, the attributes of which reflect this social phenomenon. The constituent elements of the crimes of terrorist orientation represent the criminal and legal forms of manifestation of terrorism, each of which reflects a particular side of the mentioned phenomenon. It is only under the condition of compliance (systemacity and the rules of the legislative technique) with the mentioned requirements that a necessary prerequisite for the criminal and legal counteraction of terrorism will be created.

A successful struggle against any negative social phenomenon is only possible under the condition of clear definition of its boundaries. A concept shall mean a form of thinking, which reflects and fixes the essential attributes of things and phenomena of the objective reality.

Forming the concept of a particular phenomenon, which are inherent in this particular phenomenon and which make it possible to distinguish it from other phenomena. An effective struggle against the mentioned phenomenon is impossible without the detection of the essential attributes of terrorism, since the volume of criminalization of the crimes of terrorist orientation and the attributes of specific constituent elements of crimes depend on the approach to the understanding of terrorism.

According to the applicable legislation of the Russian Federation, the main attributes of terrorism as a social phenomenon are as follows:

1. The concept of terrorism covers both the ideology of violence, and the practice of its embodiment, associated with the acts of violence.
2. In terrorism, violence and intimidation of the population represent a means of achievement of a specific purpose – influencing the taking of decisions by government authorities and international organizations.

In our opinion, the lack of consensus on the issue of definition of terrorism is not associated with ethical or legal difficulties in the formulation of this concept, but, unfortunately, with the opportunistic and political approach to this problem. It appears that the concept of terrorism should be based on the two main attributes, which characterize the purpose and the means of terrorism as a social phenomenon. The purpose of terrorism is to influence the taking of decisions by government authorities and international organizations (to force the government authorities and

international organizations to perpetrate the acts or to refrain from the perpetration thereof). Unlawful acts of violence, which intimidate the population, constitute the means for achievement of the mentioned purpose.

In our opinion, it is precisely the unlawful means of violence that define the essence of terrorism as a dangerous and negative social phenomenon. Attention to this peculiarity was directed by I. A. Ilyin (1925), a Russian philosopher, who stated that the evil, generally speaking, is not at all limited to the “improper purpose”; improper means are equally characteristic of it.

The purpose of influencing the taking of decisions by government authorities and international organizations is in itself an ethically and socially neutral purpose. The influence on the taking of decisions by government authorities can only be considered as terrorism, which rests on the unlawful acts of violence intimidating the population.

The unlawful means of violence automatically form the unlawfulness of the purpose. This is precisely why it has been explicitly stated in the Council of Europe Convention on the Prevention of Terrorism (CETS N 196) that perpetration of crimes of terrorist orientation cannot be justified by considerations of political, philosophical, ideological, racial, ethnic, religious or other similar nature. This approach is based on an immutable ethical canon, in accordance with which the end cannot justify the means.

Unfortunately, when implementing foreign policy, the states sometimes turn a blind eye to the means, which use particular forces in order to achieve the purpose. These forces begin to be considered “insurgent fighters”, “fighters for self-determination”, “fighters against dictatorial political regimes”, etc. At the same time, the fact that these forces try to influence the taking of decisions by government authorities using unlawful acts of violence which intimidate the population.

Conclusion

In the achievement of their purpose, terrorists always use a human as a means, including such non-material benefits, belonging to the human, as life and health. In ethics, there is a compulsory requirement of the so-called categorical imperative, in accordance with which a human can always be considered as a purpose and can never be considered as a means. The ideology of terrorism always violates this requirement, considering the human life and health as a means of influence on the taking of decisions by government authorities.

In the case where we would approach the persons who perpetrate unlawful acts of violence, which intimidate the population on a case-by-case basis, depending on the nature of their purpose (“bad” or “good” influence on the taking of decisions by government authorities), we will inevitably have to take the position of ethical relativism, which presupposes the relativity of requirements of morality and justification of the means by the end. In our opinion, this is precisely why in the evaluation of a particular phenomenon as terrorism we should focus on the simultaneous presence of the two attributes: the purpose of influencing the taking of a decision by government authorities and international organizations, and the means of achievement of the mentioned purpose, associated with the unlawful acts of violence, which intimidate the population.

The simultaneous presence of these two attributes gives the grounds for recognizing the phenomenon as terrorism, regardless of the considerations the persons who influence the forced taking of decisions by government authorities are ruled by.

Consequently, terrorism, as a social and legal phenomenon, represents a complex and integrated concept, and the main task of the Russian legislator in the field of counteraction of terrorism is to detect various objectively existing forms of manifestation of terrorism and fix the attributes of these forms in the criminal law.

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Prof. Dr. Anna Serebrennikova, Lomonosov Moscow State University, Moscow, Russia,
serebranna@hotmail.com

Assist. Prof. Yekaterina Mashkova, Lomonosov Moscow State University, Moscow, Russia

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